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June 2018 Edition

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

The Department of Energy and the National Nuclear Security Administration execute some of the largest and most technically complex projects in the world. In that context, we are always striving to highlight to our Federal Project Directors (FPDs) and our contract partners the best tools available to manage these highly complex projects.

This newsletter will highlight some of the latest tools and enhanced capabilities that we have incorporated into our enterprise-wide Project Assessment and Reporting System (PARS). The PARS system is the central repository and the system of record for all project information, documentation, and performance data. The contractor's performance data is extracted from the contractor's systems utilizing an automated extraction tool, which reduces the chance for error and ensures that we are all looking at the same data set enterprise-wide. Having the performance data at your fingertips allows the federal and contractor partners to accurately assess the project's health and allows DOE's leadership the opportunity to make timely management decisions, as needed. Read more inside.

In addition, please take time to read the article on Joint Cost and Schedule Confidence Level (JCL) analysis, one of the most sophisticated risk modeling methodologies. Effective risk management is another key to successful project management. JCL analysis is the integration of cost, schedule, risk and uncertainty, based on the probabilistic cost loading of a probabilistic schedule. (Quite the mouthful.) While it is not necessary to use JCL modeling on all projects, it is highly

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Paul Bosco,
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recommended for our larger, more complex projects. The more complex the schedule, with lots of moving parts and internal (and external) interfaces, the greater utility of using JCL. It allows project team members to see the impacts of risks to a project as well as illustrate the relationship between cost and schedule. Understanding these relationships is critical to effectively and proactively managing risk to ensure successful project delivery on some of our largest projects.

Keep charging!

Sincerely,
PAUL BOSCO

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Joint Confidence Levels, An Additional Risk Management Tool

Ed Gully, Office of Departmental Project Oversight (PM-20)

The Department of Energy's (DOE's) project teams are charged with executing challenging projects in dynamic environments. Uncertainty and risk are inevitable. A quantitative risk analysis can be an effective tool in assessing the probability and impact of project risks. The purpose of a quantitative risk analysis is to provide risk-based project budget and completion date estimates using statistical modeling techniques such as Monte Carlo simulations.

Confidence levels are typically used in a quantitative risk analysis. A confidence level is defined as the likelihood, expressed as a percentage, that an occurrence will be realized. The higher the confidence level, the higher the probability that the event will occur.

DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*, requires that risks for all capital asset projects be analyzed using a range of 70-90% confidence level at Critical Decision (CD)-2, *Approve Performance Baseline*, and reflected in funded contingency/management reserve, budgetary requests and funding profiles. If a project has a Performance Baseline (PB) change, Federal Project Directors should consider reanalyzing the risks at a higher confidence level (typically 95%) and then reflecting this in budgetary requests and funding profiles.

When using a Monte Carlo simulation to generate the risk- and uncertainty-based Total Project Cost (TPC) and CD-4, *Approve Start of Operations or Project Completion*, date, the TPC and CD-4 date are typically determined independently. The confidence level is the probability that the TPC or CD-4 date from the simulation can be achieved or bettered. This is currently a reasonable approach for most projects.

Another potential approach in our quantitative risk analysis is the use of a Joint Confidence Level (JCL). A JCL identifies the probability that a given project's cost will be equal to or less than the specified TPC and the completion date will be equal to or earlier than the specified CD-4 date. Or another way, a JCL can be viewed as a single integrated process (or model/simulation) which combines a project's cost, schedule, and risk into a complete risk-based picture.

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Joint Confidence Levels, An Additional Risk Management Tool

Ed Gully, Office of Departmental Project Oversight (PM-20)

Given that a JCL requires an integrated risk model, the use of a JCL is currently recommended only for our larger and more complex projects. It is important to note that a JCL is not based on a specific methodology (e.g., resource-loaded schedule) or a product from a specific tool (e.g., Polaris). It is a process that uses the same inputs as a standard probabilistic risk analysis and can be developed with various off-the-shelf commercial software tools.

An example is provided to illustrate these concepts. On this illustrative project, a TPC (\$117M) and a CD-4 date (September 19, 2022) were independently generated at an 85% confidence level. A JCL model was then used, and the resulting "scatter plot" is provided in the figure below. Using the independently generated TPC and CD-4 values (again, at the 85% confidence level) to position the "cross hairs" (see step 1 below) in the figure below, a JCL of approximately 74% was determined (see step 2 below). This example illustrates that the JCL (74%) is lower than the confidence levels (85%) associated with the independently determined TPC and CD-4 values. In this case, the JCL (74%) associated with independently generated TPC and CD-4 (85% confidence level) was used as an additional tool to assess the project's risk and uncertainty; the 85% JCL curve (see figure below) was not used to identify a specific TPC and CD-4 date.

[Click here to view the JCL graph](#)

Want to learn more about JCLs? NASA has utilized JCLs for several years on its larger projects. See the websites below for NASA's perspective and background on the use of JCLs.

- https://www.nasa.gov/pdf/724371main_76646-Risk_Analysis_Brochure-Final6.pdf
- https://www.nasa.gov/sites/default/files/files/VPMC_Session_4_JCL_Slides_for_website.pdf

It is important to stress that these simulation and modeling techniques are only as good as the key input to the models (e.g., the discrete risks identified and their corresponding likelihoods and impacts after implementing risk handling strategies, consideration of potential risk correlation, etc.).

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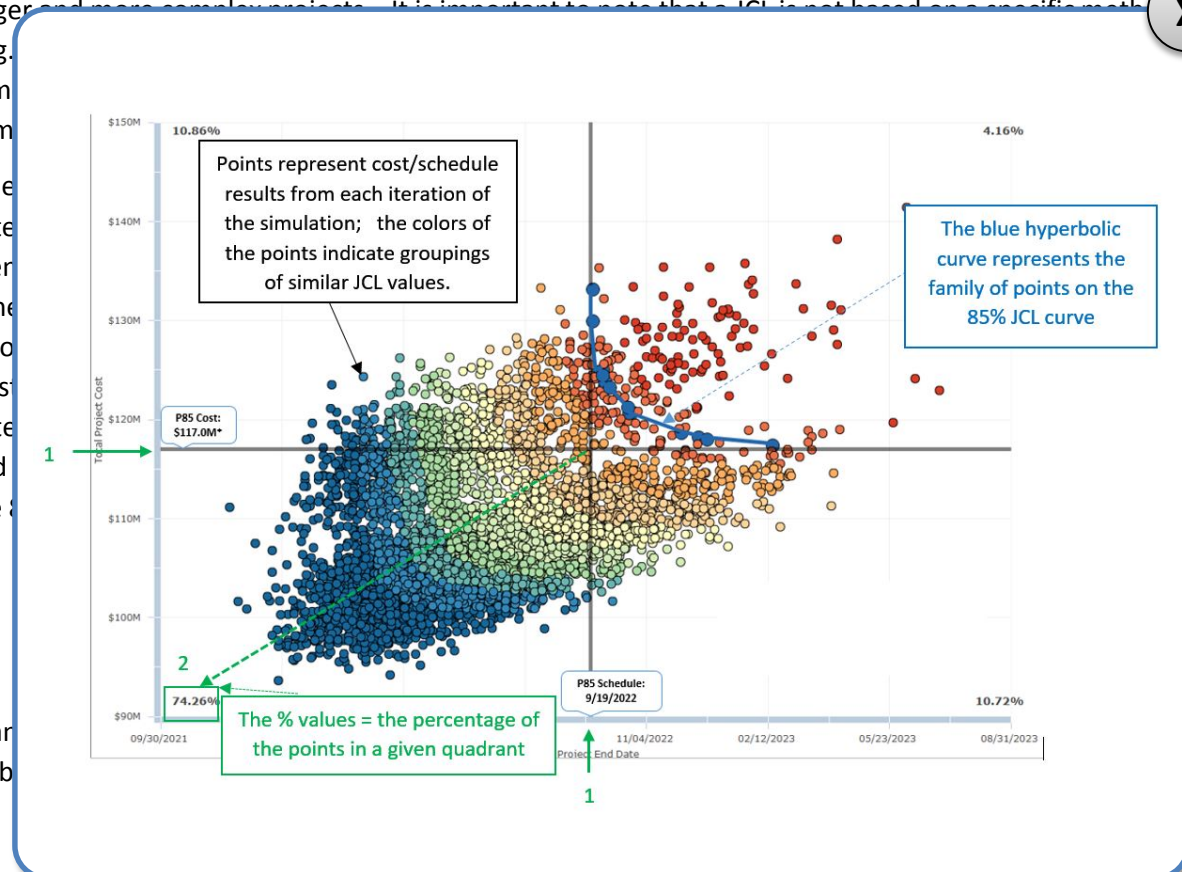
Joint Confidence Levels, An Additional Risk Management Tool

Ed Gully, Office of Departmental Project Oversight (PM-20)

Given that a JCL requires an integrated risk model, the use of a JCL is currently recommended only for our larger and more complex projects. It is important to note that a JCL is not based on a specific method (e.g., same as a risk register).

same as a risk register. An example of the data that they generate below illustrates the data and the results.

Warren



It is important to stress that these simulation and modeling techniques are only as good as the key input to the models (e.g., the discrete risks identified and their corresponding likelihoods and impacts after implementing risk handling strategies, consideration of potential risk correlation, etc.).



Scheduling Best Practices – Sequencing All Activities

David Kester and Robert Loop, Office of Project Controls (PM-30)

The U.S. Government Accountability Office (GAO) has published a Schedule Assessment Guide ([GAO-16-89G](#)), which presents 10 Best Practices associated with developing and maintaining a reliable, high-quality project schedule. The Guide also presents guiding principles for use by auditors to evaluate schedules in use on government programs and projects. This article is the second in a PM-30 series describing various characteristics of high quality schedules that meet the criteria outlined in the GAO Schedule Assessment Guide. The first article can be found in the April 2018 PM Newsletter.

GAO Scheduling Best Practice #2, Sequencing All Activities, is stated as follows:

Best Practice 2: The schedule should be planned so that critical program dates can be met. To do this, activities must be logically sequenced and linked—that is, listed in the order in which they are to be carried out and joined with logic. In particular, a predecessor activity must start or finish before its successor. Date constraints and lags should be minimized and justified. This helps ensure that the interdependence of activities that collectively lead to the completion of activities or milestones can be established and used to guide work and measure progress.

A comprehensive Integrated Master Schedule (IMS) plays a crucial role in ensuring that a project scope, time (schedule), and cost can be tracked and monitored. To ensure success, the scope of work must be clear, activity durations realistic, and resources assigned for accomplishing the work must be appropriate. Dependencies and logic between activities provides visibility as to how delays in one activity could impact future activities, and potentially the entire project. Without the identification of dependencies and subsequent logic relationships, it is difficult to know how changes to individual activities will ultimately affect other related activities in later stages of the project.

The IMS networked schedule establishes a logical sequence of work that leads through key milestones, events, and/or decision points, and is a predictive model of how the project is intended to be executed to completion of project objectives and deliverables reflected in the contract. The granularity of both the baseline and forecast schedule must be sufficient to promote a clear understanding of the work tasking at

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David Kester and Robert Loop, Office of Project Controls (PM-30)

the work performance level. This means the detailed activities must be sequentially planned in the way they will be worked. All activities in the schedule should have both predecessor and successor relationships, with the exception of logical external receipts or deliveries including the project start and end. The logical sequence of design and construction work package activities and planning packages in the project schedule from start to finish must reflect a strategy capable of meeting the scope specifications and requirements. Additionally, all activities and milestones should be baselined to provide the ability to measure changes in time from the baseline plan to the current forecast schedule.

By establishing the network logic through the sequence of work, the schedule can identify the project's critical path which is the path of longest duration through the sequence of activities with the least amount of total float. Establishing a valid critical path is necessary for examining the effects of any activity's slipping along this path. The project critical path determines the project's earliest completion date and focuses the team's energy and management's attention on the activities that will lead to the project's success. From a project manager's perspective, the sequencing of activities provides the execution strategy for meeting the project's cost, schedule and performance objectives.

[Click here to view a simple sequence
of work example](#)

As a general rule, the GAO recommends that every activity within the schedule should have at least one predecessor and at least one successor. The two natural exceptions to this rule are the project start milestone, which has no predecessor, and the project finish milestone, which has no successor. Other activities or milestones within the schedule may have no predecessor or successor links when they represent schedule inputs or outputs. For example, a milestone may represent the handing off of some interim product to an external partner by the project office that therefore has no successor relationship within the schedule. However, any activity that is missing predecessor or successor logic must be clearly justified in the schedule documentation.

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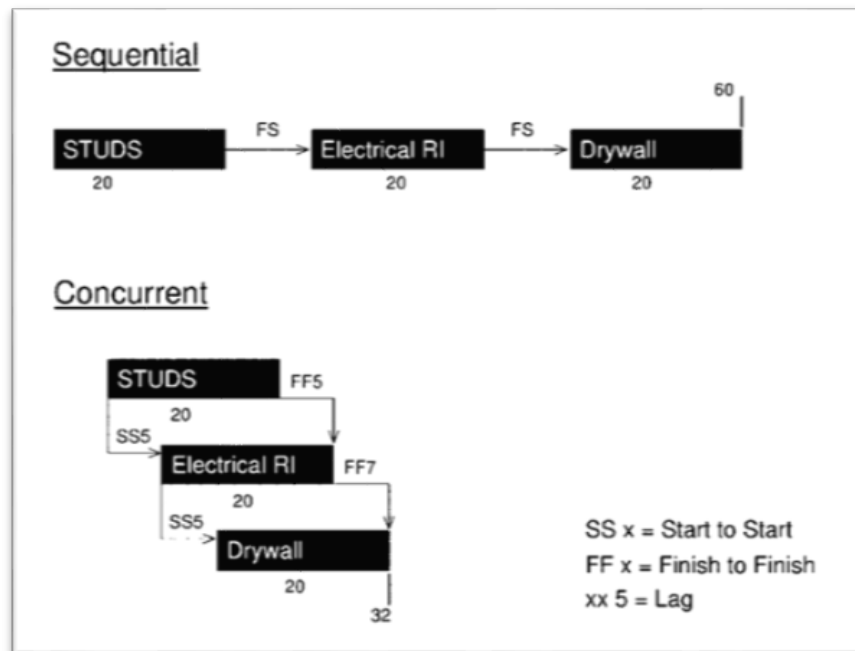
Scheduling Best Practices: Sequencing All Activities

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This figure shows the sequence of work for constructing a basic room leading to the installation of drywall. In this example, the project manager is presented with two options for completing the room. The sequential option (or strategy) will require 60 days to complete, whereas the concurrent option will take just 32 days to complete with the use of lags. Note that the concurrent option uses different relationships to position the activities in order to achieve the reduction in time. For both options, the sequence of work remains the same for the work being performed before drywall work is initiated. In other words, the placement of studs must precede the electrical rough-in which cannot be concealed or covered until that work has been inspected and approved. The selection of a preferred option by the project manager will take into account the total time needed to complete the work, and the availability of resources.

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David Kester and Robert Loop, Office of Project Controls (PM-30)

The use of lags and leads can have a significant impact on the length of the schedule. A lag is waiting time between the predecessor and successor activities. Typical lag applications includes Start-to-Start, Finish-to-Start, and Finish-to-Finish relationships. Leads are merely negative lags and in general should not exist. In most cases, a lag will represent a missing activity in the schedule and its replacement by an activity is preferred.

Finally, while the use of activity constraints can increase a project manager's control of the project schedule, they can also lead to complications with the schedule network's calculation of the critical path and total float values. While the project end date requires a hard constraint to calculate float values and run a critical path, it is otherwise recommended that the use of activity constraints be limited to prevent the development of a rigid and illogical project schedule.

[Click here to view examples of hard and soft constraints](#)

[Click here to see suggested questions to consider when determining the proper sequencing of activities](#)

GAO Scheduling Best Practice #3, Assigning Resources to All Activities will be discussed further in a future PM Newsletter.



Scheduling Best Practices – Sequencing All Activities

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Hard and Soft Constraints

The following are considered hard constraints in Primavera P6:

- Mandatory Start or Finish
- Finish or Start On or Before
- Start or Finish On

Soft constraints are most commonly used to model resource restrictions and material/subcontractor delivery dates. Soft constraints in Primavera P6 are defined as:

- Start and Finish After
- As Late as Possible

sequencing of activities

GAO Scheduling Best Practice #3, Assigning Resources to All Activities will be discussed further in a future PM Newsletter.



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Scheduling Best Practices – Sequencing All Activities



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Question to Consider When Determining the Proper Sequencing of Activities

- Do all discrete activities identify a logical predecessor and successor with the only exceptions being the activities at the beginning and end of the project?
- Is Finish-to-Start (FS) the predominant relationship used (generally ~90% of all activity relationship types)?
- Are Start-to-Start (SS) or Finish-to-Finish (FF) relationships appropriate considering the order of work and the availability of resources?
- Have Start-to-Finish (SF) activity relationships been minimized and justified, if used at all?
- Are all activity date constraints justified and documented?
- Are unavoidable “hard constraints” used sparingly, and are they justified in reference to a controlling project event or milestone?
- Are lags used in the schedule only to denote the passage of time between two activities, or can they be replaced by an activity?

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Why PARS Matters

Rob Stern – Office of Project Controls (PM-30)

If you are new to the Department, management of DOE Capital Asset projects, or just out in the field away from the mysterious workings inside the beltway, you may wonder why the Project Assessment and Reporting System (PARS) matters. As explained on PM-MAX (<https://community.max.gov/x/Lg1Qw>), PARS, in accordance with DOE O 413.3B, is “the central repository and official “System of Record” for project information, documentation, and performance data. It is used by Federal and contractor personnel across the DOE complex to record and track the progress and performance of construction and environmental cleanup projects.”

“The major benefit derived from PARS is its use of source project performance data as maintained in our contractors’ project management systems. As a result, everyone from the Federal Project Directors and their staff to the Deputy Secretary of Energy has easy access to the same data at the same time.”

Consider the following list of PARS standard reports, which are regularly distributed amongst the highest levels of Departmental executives, professional staff of House and Senate committees overseeing the Department, and GAO:

- PM Performance Improvement Metrics and Targets (<https://community.max.gov/x/EolURw>)
- Monthly and Quarterly Project Portfolio Status Reports (<https://community.max.gov/x/OxbeRg>)
- Monthly DOE Project Dashboard Performance Metrics (<https://community.max.gov/x/Og3LSw>)

More specialized reports based on PARS data are used by the Energy Systems Acquisition Advisory Board, the Project Management Risk Committee, and Program Office’s Project Management Executives and their advisory boards for all Project Critical Decisions, baseline change approvals, and other major project-related decisions.

Internally, project and program staffs use PARS data for in-depth performance analysis, source data for Earned Value Management System certification, compliance and surveillance reviews, and project reviews such as Project Peer Reviews (PPR), Independent Project Reviews (IPR), and External Independent Reviews (EIR).

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Rob Stern – Office of Project Controls (PM-30)

PARS also houses the Department's project Document Management System where all major project-specific reports and official documents are stored. It also contains the Project Management Lessons Learned Database and provides a module for review teams to have a website for dedicated virtual collaboration and information sharing.

As you can see, PARS is far more than just a historical record or dusty database. It is a primary information source for our projects at which we all work so hard. To learn more please refer to the support module in PARS or the PM-MAX page for PARS training (<https://community.max.gov/x/Pwp1Qw>). Another great training resource is our rotating circuit of PARS and EVMS Roadside Assist Visits where our office's staff provide in-depth training on various topics of current interest to project staff at the sites.

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PARS FPD Toolbox: A Valuable Project Management Tool

Don Chandler, Office of Project Assessment (PM-20)

The FPD Toolbox in the PARS application is a great tool that can benefit FPDs and all project stakeholders in managing and tracking the Federal controlled accounts for capital asset projects. The tool is a user friendly application that provides the needed granularity and accuracy in a one-stop location to keep everyone on the same page concerning project status. Without the FPD's consistent use of this tool, the performance data in PARS becomes less accurate (and hence less reliable) as cost data inconsistencies and duplications may be incurred.

Contact Zac West (PM-30, PARS II System Owner) if you have specific questions or need a specialized training.

What is the FPD
Toolbox?

*Click on any button
to view details*

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The FPD toolbox consists of separate registers for the federal project team's managed accounts for cost and schedule contingency, fee and other direct costs (ODC). Conceptually, each register is similar to a "checkbook" that is used to track transactions, debits, credits and remaining balances. Each log is populated with an initial deposit from the approved CD-2 Performance Baseline. Once the log is initiated with the original deposit, transactions approved by the project's change control board are entered in real time with the date, transaction type, credit or debit amount and narrative describing the transaction. The Toolbox application automatically updates the remaining balance and provides a complete history of the account use. Click the button below to view a generic example of the information available in one of the logs: the contingency log.

Transaction	Type	Description	ODCB (I)	ODCB (E)	ODCB (A)	Transaction Narrative
1/20/2017	PR BCF	BCF-001	\$1,000,000			BCF-001 Adjust Fed share to total cost of order (amount: 0.00)
1/25/2018	PR BCF	BCF-001		\$1,000,000		BCF-001 Adjust Fed share to total cost of order (amount: 0.00)
10/15/2018	Initial Deposit	CD-2 Approved	\$1,000,000			Ref: Project # FPD, CD-2 (2018), Issue # 1.0 Cost Baseline (page 20-7)

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X

COST CONTINGENCY

[Cost Contingency >](#)

CD 2 Approved Amount: \$9,000,000

Initial Deposit \$9,000,000	+	Total Credits (+) PB BCP \$3,000,000 Adjustment \$0		-	Total Debits (-) PB BCP \$5,000,000 Adjustment \$0		=	Remaining Balance Available \$7,000,000 Budgeted \$7,000,000	
---------------------------------------	---	--	--	---	---	--	---	---	--

Transaction Date	Transaction Type	Transaction Title	Credit (+)	Debit (-)	EAC Adj.	Transaction Narrative
1/18/2017	PB BCP	BCP-002	\$3,000,000			BCP-002 Adjust Fed baseline to final cost of constr. closeout (CLIN X)
12/5/2016	PB BCP	BCP-001		\$5,000,000		BCP-001 captures use of contingency for
10/31/2016	Initial Deposit	CD-2 Approved	\$9,000,000			Ref: Project X PEP, Oct 2016, Sect. 4.3 (Cost Baseline) (page 30-31)

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This enhanced capability provides greater visibility to FPDs, project teams, and project and program analysts into these logs. The FPD Toolbox is typically updated as transactions occur or as part of the monthly assessment process. The FPD Toolbox substantially improves the ability to see how these components of the project align with the overall project and provide a more complete understanding of what's going on with the project.

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The process for using the FPD Toolbox is very straightforward. A user must first navigate to an individual project site in PARS and from the left hand navigation panel, select FPD Toolbox. Once in the Toolbox you can select from the registers for Cost Contingency, Fee, ODC and Schedule Contingency. Once in the selected register, a user can add a new transaction by hovering over the name of the register and selecting Add New Transaction from the menu. Additional instruction for using the FPD Toolbox are available in PARS > Support > Support Repository. Look for the training document (or select this link) to "[PARSIIe - Entering FPD Toolbox Information](#)".

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What is the FPD
Toolbox?

PARS is the official repository for information related to all DOE capital asset projects greater than \$50M. When the PARS repository is not accurately maintained it quickly becomes apparent to all concerned and generates additional work and research to get the accurate picture for both day to day management and reporting to leadership.

The FPD Toolbox
Capability

The FPD Toolbox is an important and valuable capability that FPDs and project teams can use to actively track and monitor their project's use of contingency, fee and ODC, while simultaneously providing visibility to interested stakeholders. When FPDs use and maintain the Toolbox proactively, it has the power to streamline their communications and save time. As an FPD, if your team is not already using the tool, please check it out and put it to use for the benefit of your project team and your stakeholders.

How to use the FPD
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PARS Continuous Improvement Initiatives

Matthew "Zac" West, Office of Project Controls (PM-30)

Future changes to PARS were discussed on the project controls day of this year's Project Management Workshop. These efforts include a new data-extractor for contractor uploads, improved tools for self-governance, and a new workflow system to capture and track change requests. As these improvements go forward with design and testing the current system remains operational. The latest monthly email notification to PARS users is provided below:

A new PARS reporting period (June 2018) was opened (5/25/2018 for April 2018 contractor upload data), and the previous period was closed. Users may now begin the monthly assessment process according to the below processing schedule:

- Friday, 5/25: New reporting period opens. FPDs, Program Analysts, and PM analysts may begin entering their monthly assessments.
- Thursday, 5/31: (last workday of each month): Contractors must finalize the upload of their CPP files.
- Tuesday, 6/5: (third workday): FPDs must finalize their monthly assessments.
- Friday, 6/8: (sixth workday): Programs must finalize their monthly assessments.
- Wednesday, 6/13: (ninth workday): PM analysts must finalize their monthly assessments.
- By the 26th: PM publishes the monthly report.

IMPORTANT NOTES

Location: The URL for PARS is: <https://pars2oa.doe.gov>. Please delete any other Web addresses associated with PARS you previously bookmarked. To do this, click on the Favorites/Bookmarks menu in Internet Explorer, locate the Favorite/Bookmark for PARS and right click. A menu will pop up with an option to "Delete."

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Matthew "Zac" West, Office of Project Controls (PM-30)

Did You Know?

Your PM-20 Analyst is the best source of information on PARS processes and procedures. While you are encouraged to first consult the PARS Support Home Page, (<https://pars2oa.doe.gov/support/SitePages/Support%20Home.aspx>), you are always welcome to go directly to your PM analyst and take advantage of his/her experience and knowledge. The analyst for each project is identified on the Project Attributes/Contacts tab, and their telephone numbers are as follows:

- Peter Bako, 202-287-1940
- David Bustamante, 202-586-4572
- Donald Chandler, 202-287-1668
- Dave Chisenhall, 202-586-8410
- Michael Fenn, 202-287-1879
- Ed Gully, 202-586-5032
- Peter Lynch, 202-586-6953
- Jeff Thomas, 202-287-5847

Help with PARS

If you have any questions about this schedule or your project's specific input, please contact your respective PM analyst. If you have technical questions about 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 <https://pars2oa.doe.gov/support/Shared%20Documents/Forms/AllItems.aspx>

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Matthew "Zac" West, Office of Project Controls (PM-30)

In addition to the monthly PARS email, that same information will also be broadcast in the PM Newsletter to help ensure you can find it when you are looking for it.

One tool to highlight this month is the new change request workflow. The PARS Change Request workflow is a tool enabling any user with a PARS account to make a recommendation for PARS improvement and have the ability to track it in PM-MAX (see Figure 1 below). When the user's change request form ([Click here for form](#)) is submitted, the workflow tracker will provide information on the status of their idea. PM asks that you use the change request system to help us capture ideas to improve the system in the future. Understand that not all suggestions can be incorporated, generally due to security or system configuration requirements, but the workflow will let users capture the request and see what happened to it. We look forward to hearing your suggestions soon.



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Matthew "Zac" West, Office of Project Controls (PM-30)

In addition to the monthly PARS email, the information in the monthly PARS email will now be added to the PM Newsletter to help ensure you can find it when you are looking for it.



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Ivan Graff, Office of Policy and Program Support (PM-50)

PM announces the recent revision of DOE Guide 413.3-21, *Cost Estimating*, and initial publishing of DOE Guide 413.3-22, *Analysis of Alternatives*, both intended to provide non-mandatory guidance for complying with requirements found in DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*.

The Cost Estimating Guide emphasizes the importance of following the Government Accountability Office (GAO) Cost Estimating and Assessment Guide (GAO-09-3SP) and introduces new content related to sensitivity analyses. This guide provides a ready resource for the preparation of a capital asset project cost estimate at any point in the project lifecycle.

The Analysis of Alternatives Guide, useful for guiding planning and decision making supporting the selection of an alternative at Critical Decision-1, *Approve Alternative Selection and Cost Range*, follows the most recently published GAO best practices on the subject found in GAO Report 16-22.

PM gratefully acknowledges the contributions of Program and Support Office representatives whose comments on drafts of both of the Guides improved the final products significantly. PM welcomes at any time your suggestions for improving the Guides.

Find the newly revised and published Guides on the DOE Directives Website: <https://go.usa.gov/xQs37>.

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On DOE's Policies

The Office of Project Management welcomes your comments on the Department's policies related to DOE Order 413.3B. Please send citations of errors, omissions, ambiguities, and contradictions to PMpolicy@hq.doe.gov. Propose improvements to policies at <https://hq.ideascale.com>.

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If you have any questions regarding the reporting schedule or about your project's specific input, please contact your respective PM analyst. If you have technical questions about 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 <https://pars2oa.doe.gov/support/Shared%20Documents/Forms/AllItems.aspx>

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Have a question, found a bug or glitch in a PMCDP online course, or want to provide feedback on a PMCDP course you took through DOE's Learning Nucleus? We have a mailbox for that! Submit your issues through PMCDPOnlineCourseSupport@hq.doe.gov

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Can't find the Word templates to apply for FPD certification? The Certification and Equivalency Guidelines (CEG) isn't where you last found it and you are not sure where to look? Use the PMCDP.Administration@hq.doe.gov mailbox.

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Can't put your finger on a document or information you were told is available on PM-MAX? Looking for the PMCDP Training Schedule and cannot find it? Looking for information on DOE Project Management? Submit your questions and queries to PMWebmaster@doe.gov. Check out these links below for information related to FPD Certification and the PMCDP Training

Direct Link	Copy / Paste
PMCDP Training Schedule	https://community.max.gov/x/BgZcQw
Interactive Curriculum Map	https://community.max.gov/download/attachments/1131743153/PMCDP%20Interactive%20Map.pdf?version=1&modificationDate=1512482483778&api=v2
FPD Certification Application Templates	https://community.max.gov/x/uAd1Qw
Certification Equivalency Guidelines	https://community.max.gov/download/attachments/1131743160/June_2015_CEG_FINAL.pdf?version=1&modificationDate=1472838487652&api=v2
Course Materials including video recordings of Desktop Deliveries	https://community.max.gov/x/UAT3Rw

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[Click here to view training in June](#)

[Click Here for the Full FY 2018 Training Strategy*](#)

** To print the FY 2018 Training Strategy, print only pages 43-48 of this document*

On-Demand Online Training**

***On-Demand courses are available at any time through DOE's Learning Nucleus*

Contracting Officer Representative
32 CLPs

Environmental Laws and Regulations
24 CLPs

Earned Value Management Systems (24/7)
21 CLPs

On-Demand DAU Online

On-Demand Learning Nucleus

On-Demand Learning Nucleus

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Project Management Essentials
50 CLPs

Scheduling
21 CLPs

On-Demand Learning Nucleus

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Upcoming Training: May – June 2018

Scope Management
Baseline Development

3 Days / 24 CLPs

June 12-14
Aiken, SC

Project Management
Simulation

5 Days / 40 CLPs

June 18-22
Oak Ridge, TN

Federal Budgeting
Process in DOE

4 Days / 32 CLPs

June 25-28
Aiken, SC



Upcoming Training: May – June 2018

X

Scope Management Baseline Development

PMCDP is offering an instructor-led delivery of the 3-day course, *Scope Management Baseline Development*, June 12-14, 2018 in Aiken, SC.

This course is designed to enhance a Program or Project Manager's ability to clearly define requirements and scope, develop a defensible baseline, and manage conformance to the baseline throughout the project life-cycle. The course emphasizes the development of the Work Breakdown Structure (WBS).

Topic areas include:

- Baseline development techniques
- Identifying risk and constraints for requirements
- Prioritizing requirements
- Trade-off analysis
- Iterative requirements management
- Scope change/configuration management

You will earn 24 continuous learning points for this course. This is a Required course for the Level 2 FPD certification for Federal Project Directors and is available to all DOE employees.

CHRIS Code: 001036/0029

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Project Management Simulation

PMCDP is offering an instructor-led delivery of the 5-day course, *Project Management Simulation*, June 18-22, 2018 in Oak Ridge, TN.

This course provides the participant with the fundamental concepts of project management in the federal government, with an emphasis on application of tools and techniques to manage a federal acquisition project. This course will include information to satisfy mid-level requirements development and management processes, systems engineering, life cycle logistics, test and evaluation, and competencies and performance outcomes, as defined by the FAC-P/PM policy and competency model.

Discussions of the project life cycle phases will integrate the systems engineering process and related test and evaluation decisions made by the integrated project team (IPT). Expanding on the integrated approach, the course includes information on how to develop an Integrated Master Plan (IMP), and also consider the total cost of ownership and life cycle costs (LCC). Finally, the participants will reinforce the knowledge gained in this course and apply their skills to a series of exercises and case studies.

Learning Objectives:

- Explain the IPT's role in relation to acquisition within the project life cycle
- Relate the systems engineering process to the technology acquisition process
- Describe the Test and Evaluation team's function, the Master Test Strategy, and the V Model for testing
- Discuss the process to develop an Integrated Master Plan (IMP)

You will earn 40 continuous learning points for this course. This is a Required course for the Level 2 PMCDP certification for Federal Project Directors and is available to all DOE employees.

CHRIS Code: 001029/0038

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Federal Budgeting Process in DOE

PMCDP is offering instructor-led deliveries of the 4-day course, *Federal Budgeting Process in DOE*, June 25-28, 2018 in Aiken, SC.

This course is designed to provide DOE and NNSA program and project managers a working knowledge of Federal financial and managerial systems to accomplish their Department's budgeting and accounting processes, including budget submissions, managing authorized funding and establishing success criteria. Participants apply the foundational skills required to successfully manage a project through its financial life cycle. These skills include: integrating projects, programs, and missions; resourcing and funding programs; validating and funding projects; effectively participating in the budget process; managing the flow of funds to programs and projects and effectively using financial accounting and reporting systems to attain program and project success.

You will earn 32 continuous learning points for this course. This is an Elective course for the Level II PMCDP certification for Federal Project Directors and is available to all DOE employees.

CHRIS Code: 001034/0034

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Contracting Officer Representative (CLC 222)

This course is specifically designed for Contracting Officer's Representatives (CORs) who are responsible for assuring that contractors are performing the technical portion of their job. This course will provide CORs the breadth of knowledge required to perform their role, including knowledge related to COR roles and responsibilities, as well as fundamentals of contracting regulations, types, phases, and other elements; awareness of ethical, legal, and cultural factors that impact COR responsibilities; and information necessary to effectively evaluate situations, apply knowledge gained, and make correct decisions to carry out COR responsibilities.

Course objectives include:

- Understanding the role of the COR
- Understanding what constitutes an effective COR
- Learning to read and understand a contract

Registration is through DAU Online

You will earn 32 continuous learning points for this course. This is a Required course for the Level I Federal Project Director certification and is available to all DOE employees.

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Environmental Laws and Regulations

PMCDP hosts on DOE's Learning Nucleus a Level II Elective Course titled "*Environmental Laws and Regulations.*" This online course provides 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 Learning Nucleus

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.

Learning Nucleus

Learning Nucleus



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Earned Value Management Systems (24/7)

PMCDP hosts on DOE's Learning Nucleus the Level 1 Core Course titled "Earned Value Management Systems (24X7)." 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 Learning Nucleus

You will earn 21 continuous learning points for this course. This is a required course for the Level I PMCDP certification for Federal Project Directors and is available to all DOE employees.

Learning Nucleus

Learning Nucleus



Upcoming Training

A circular button with a grey background and a white 'X' icon, used to close the training window.

Project Management Essentials

PMCDP hosts on DOE's Learning Nucleus 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 Learning Nucleus

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 required 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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Project Management Essentials

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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

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Scheduling

PMCDP hosts on DOE's Learning Nucleus, a continuous learning opportunity entitled "Scheduling." The course is intended for DOE employees to gain a solid foundation in project scheduling and enhance project scheduling proficiency. This online course employs a virtual learning lab to provide an intensive 21 hours of instruction that covers scheduling tools, techniques, and philosophies, which can have a major impact to performance assessments and day-to-day project management decision-making. Participants may test their knowledge and gain immediate feedback with scored quizzes and case studies.

Upon completion of the training, participants will understand the fundamental background of scheduling concepts and their specific applications with emphasis on analysis using the Critical Path Method.

Topics include:

- Critical path fundamentals
- Schedule baseline
- Float
- Network logic development
- Risk assessment
- Changes
- Scheduling in an EVMS environment

Registration is through the Learning Nucleus

You will earn 21 continuous learning points for completing this course. This is a continuous learning opportunity for Federal Project Directors and is available to all DOE employees.

Learning Nucleus

Learning Nucleus

FY2018 PMCDP Schedule (4/24/2018)

Q1 FY 2018:

Course Title/CHRIS/Instructor	Length CLPs	Planned Delivery Timeframe	Location/ Platform/
Project Management Systems and Practices in DOE CHRIS Code:001024/0047 Dana Krupa	60 CLPs	Tuesday/Thursdays 1-3pm ET October 3-November 7	NA / Desktop delivery Adobe Connect
Advanced Earned Value Management CHRIS Code: 002689/0011 Gary Humphreys	3 Days 24 CLPs	October 17-19	Classroom Oak Ridge, TN Peter Rivera
LEED for New Construction and Existing Buildings CHRIS Code: 001936/0021 Jason Kliwinski	2.5 Days 20 CLPs	October 17-19	Classroom Idaho Falls, ID Tina Wagoner
Federal Budgeting Process in DOE CHRIS Code: 001034/0032 Alice Murphy	4 Days 32 CLPs	November 6-8	Classroom Richland, WA Vicki Spitz
Negotiation Strategies and Techniques CHRIS Code: 001047/0025 Peter Bonner	24 CLPs	Wednesdays 11am-1pm ET November 1-December 13	NA / Desktop delivery POC: Sig Ceaser
Leadership through Effective Communication CHRIS Code: 002366/0030 Mac Bogert	3 Days 24 CLPs	December 11-13	Classroom Golden, CO Lisa Weber

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Q2 FY 2018:

Course Title/CHRIS/Instructor	Length CLPs	Planned Delivery Timeframe	Location/ Platform
Project Risk Analysis and Management CHRIS Code: 001033/0055 Sean Casey	3.5 Days 28 CLPs	January 9-12	Classroom Oak Ridge, TN Peter Rivera
Advanced Earned Value Management CHRIS Code: 002689/0012 Gary Humphreys	3 Days 24 CLPs	January 16-18	Classroom EMCBC John Wood
Front-End Planning Course CHRIS Code: 003176/0001 Edd Gibson	3 Days 24 CLPs	January 17-19	Classroom Pilot Washington, DC
Project Risk Analysis and Management CHRIS Code: 001033/0054 Sean Casey	3.5 Days 28 CLPs	January 22-25	Classroom Aiken, SC Lee Moody
Performance Based Management Contracting CHRIS Code: 001951/0026 Jerry Zimmer	3 Days 24 CLPs	January 23-25	Classroom Golden, CO Lisa Weber
Facilitating Conflict Resolution CHRIS Code: 001558/0026 Peter Bonner	24 CLPs	February 6-March 13 Tuesdays 11-12:30pm EST	NA / Desktop delivery POC: Sig Ceaser
Real Property Asset Management CHRIS Code: 001183/0024 Julie Meier	3 Days 24 CLPs	February 6-8	Classroom PILOT Washington, DC Julie Meier
Scope Management Baseline Development CHRIS Code: 001036/0028 Sean Casey	3 Days 24 CLPs	February 6-8	Classroom EMCBC John Wood
Federal Budgeting Process in DOE CHRIS Code: 001034/0033 Alice Murphy	4 Days 32 CLPs	February 12-15	Classroom Golden, CO Lisa Weber

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Course Title/CHRIS/Instructor	Length CLPs	Planned Delivery Timeframe	Location/ Platform
Value Management CHRIS Code: 001037/0017 Jeff Rude	3 Days 24 CLPs	February 20-22	Classroom Richland, WA Pamela Packer
Managing Contract Changes CHRIS Code: 002102/0069 Jerry Bertrand	4 Days 32 CLPs	March 5-8	Classroom Aiken, SC Lee Moody
Cost and Schedule Estimate and Analysis CHRIS Code: 001044/0032 Sean Casey	5 Days 40 CLPs	March 12-16	Classroom EMCBC John Wood
Labor Management CHRIS Code: 001038/0013 Don Musacchio	3 Days 24 CLPs	March 13-15	Classroom Richland, WA Pamela Packer
Capital Planning for DOE O 413.3B CHRIS Code: 002152/0013 Sean Casey	16 CLPs	March 19-April 9 Monday/Wednesday 1pm-4pm ET	NA/Desktop Delivery POC: Sig Ceaser
Labor Management CHRIS Code: 001038/0012 Don Musacchio	3 Days 24 CLPs	March 27-29	Classroom Oak Ridge, TN Peter Rivera

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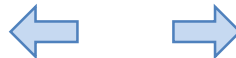


FY2018 PMCDP Schedule (4/24/2018)

Q3 FY 2018:

Course Title/CHRIS/Instructor	Length CLPs	Planned Delivery Timeframe	Location/ Platform
Strategic Planning CHRIS Code: 001043/0016 Marvin Gunn	3 Days 24 CLPs	April 10-12	Classroom Aiken, SC Lee Moody
Cost and Schedule Estimate and Analysis CHRIS Code: 001044/0034 Sean Casey	5 Days 40 CLPs	April 16-20	Classroom New Orleans, LA Claudia LeCompte- Johnson
Planning for Safety in Project Management CHRIS Code: 001035/0061 Dana Krupa	28 CLPs	April 18-May 16 Wednesday— 1pm -3pm ET	NA/ Desktop delivery POC: Sig Ceaser
Managing Contract Changes CHRIS Code: 002102/0070 Jerry Bertrand	4 Days 32 CLPs	April 30-May 3	Classroom Idaho Falls, ID Tina Wagoner
Advanced Risk Management CHRIS Code: 001042/0025 Chris Gruber	3.5 Days 28 CLPs	May 21-24	Classroom EMCBC John Wood
Executive Communications CHRIS Code: 001031/0040 Shelley Simms	3 Days 24 CLPs	June 5-7	Classroom Richland, WA Pamela Sorenson
Leadership through Effective Communication CHRIS Code: 002366/0031 Mac Bogert	3 Days 24 CLPs	June 5-7	Classroom Oak Ridge, TN Dean Jackson
Project Management Systems and Practices in DOE CHRIS Code: 001024/0048 Dana Krupa	60 CLPs	June 5-July 31 Tue/Thurs 1-3pm EDT	NA/Desktop delivery
Scope Management Baseline Development CHRIS Code: 001036/0029 Sean Casey	3 Days 24 CLPs	June 12-14	Classroom Aiken, SC Lee Moody

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FY2018 PMCDP Schedule (4/24/2018)

Project Management Simulation CHRIS Code: 001029/0038 Larry Suda	5 Days 40 CLPs	June 18-22	Classroom Oak Ridge, TN Dean Jackson
Federal Budgeting Process in DOE CHRIS Code: 001034/0034 Alice Murphy	4 Days 32 CLPs	June 25-28	Classroom Aiken, SC Lee Moody

Q4 FY 2018:


Course Title/CHRIS/Instructor	Length CLPs	Planned Delivery Timeframe	Location/ Platform
Project Management Simulation CHRIS Code: 001029/0039 Larry Suda	5 Days 40 CLPs	July 23-27	Classroom Aiken, SC Lee Moody
Managing Contract Changes CHRIS Code: 002102/0071 Jerry Bertrand	4 Days 32 CLPs	July 30-August 2	Classroom Richland, WA Pamela Packer
Advanced Concepts in PM CHRIS Code: 001023/0043 Dana Krupa	50 CLPs	July 31-Sept 25 Tue/Thurs 1-3pm EDT	NA / Desktop delivery
Value Management CHRIS Code: 001037/0019 Jeff Rude	3 Days 24 CLPs	July 31-August 2	Classroom Chicago/Argonne Sandra Geib Ingram
Project Risk Analysis and Management CHRIS Code: 001033/0056 Sean Casey	3.5 Days 28 CLPs	August 6-9	Classroom Richland, WA Robyn Burt
Value Management CHRIS Code: 001037/0018 Jeff Rude	3 Days 24 CLPs	August 7-9	Classroom EMCBC John Wood
Cost and Schedule Estimate and Analysis CHRIS Code: 001044/0033 Sean Casey	5 Days 40 CLPs	August 20-24	Classroom Oak Ridge, TN Peter Rivera

FY2018 PMCDP Schedule (4/24/2018)

Acquisition Management for Technical Personnel CHRIS Code: 000145/0046 Jerry Zimmer	16 CLPs	August 21-30 Tue/Thurs	NA/Desktop delivery
Leadership through Effective Communication CHRIS Code: 002366/0032 Mac Bogert	3 Days 24 CLPs	August 28-30	Classroom Aiken, SC Lee Moody
Project Management Simulation CHRIS Code: 001029/0037 Larry Suda	5 Days 40 CLPs	September 10-14	Classroom New Orleans, LA Claudia LeCompte- Johnson
Performance Based Management Contracting CHRIS Code: 001951/0027 Jerry Zimmer	3 Days 24 CLPs	September 11-13	Classroom Richland Pamela Packer

Online/On-Demand Training:

<i>DOE PMCDP Earned Value Management Systems (24/7)</i>	<i>Online 21 CLPs</i>	<i>Ongoing</i>	<i>Learning Nucleus</i>
<i>DOE PMCDP Environmental Laws and Regulations</i>	<i>Online 24 CLPs</i>	<i>Ongoing</i>	<i>Learning Nucleus</i>
<i>DOE PMCDP Project Management Essentials</i>	<i>Online 50 CLPs</i>	<i>Ongoing</i>	<i>Learning Nucleus</i>
<i>DOE PMCDP Scheduling</i>	<i>Online 21 CLPs</i>	<i>Ongoing</i>	<i>Learning Nucleus</i>
<i>Contracting Officer Representative (CLC 222)</i>	<i>Online 32 CLPs</i>	<i>Ongoing</i>	<i>DAU-Defense Acquisition Agency</i>

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Questions/Comments?

Questions or Comments

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

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Susan Mason — PMCDP Systems Planning Support, susan.mason@hq.doe.gov

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.

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