

Home

Director's Corner

External Independent  
Review (EIR) – Major  
Findings, Findings, and  
Observations

An FPD's Perspective on  
a Recent External  
Independent Review

Scheduling Best  
Practices: Assigning  
Resource to All Activities

What is an FPD to do?  
Lead the Team to Project  
Success

New LMS for DOE: The  
Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# DOE Project Management News

*Promoting Project Management Excellence*



## July 2018 Edition

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Director's Corner



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

Hope you are having a wonderful summer and are able to sneak in a vacation! Summer has hit full stride here in Washington DC. Along with a heat wave came a big jump in humidity; better than snow, from my perspective.

Speaking of perspectives, one of the reviews my office performs are External Independent Reviews (EIRs). These are done to provide Project Management Executives (PMEs), senior leaders within the Department of Energy (DOE), and Congress an independent assessment and perspective of whether a capital asset project can be executed within the proposed scope, schedule, and cost commitments.

Establishing the project's performance baseline is an important step. It must be right, and validated so as to maximize the potential for project management success. It should be completely defined and documented before project execution and control activities are useful and should begin. Collectively, these efforts are focused on project execution success.

This month we look at one EIR recently conducted to support validation of the performance baseline at Critical Decision (CD)-2 for the Office of Environmental Management's Outfall 200 Mercury Treatment Facility (OF200 MTF) Project. In this article, we have provided my office's perspective, and the Federal Project Director's (FPD's) point of view, on the EIR process. Thanks to Brian Henry for sharing his FPD experience on the EIR.

*Continued on next page...*

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Director's Corner



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

On another topic, we continue to work our way through the Government Accountability Office's (GAO's) Scheduling Assessment Guide taking a closer look at GAO Scheduling Best Practice #3, Assigning Resources to All Activities. This is the third in a series of articles on GAO's Schedule Assessment Guide. The mentioned Guide, by the way, provides ten best practices to help project managers (and auditors) ensure that the schedule is reliable. The reliability of the schedule determines the credibility of the project's forecasted dates for decision-making. Within DOE, an Integrated Master Schedule (IMS) is required, which must be resource-loaded and includes the entire required scope of effort for a project's successful execution from start to finish.

Hope you enjoy the July edition. And, I hope you enjoy the summer.  
Keep Charging!

Sincerely,  
**PAUL BOSCO**

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# External Independent Review (EIR) – Major Findings, Findings, and Observations

**Mike Fenn, Project Assessments Division (PM-20)**

For capital asset projects with a Total Project Cost (TPC) of \$100M or more, DOE PM performs an EIR to support validation of the project performance baseline (PB) at Critical Decision (CD)-2 and Construction/Execution Readiness at CD-3. In addition, EIRs are conducted for baseline change proposals which would change scope, schedule, or cost for a project beyond the approved PB.

The EIR evaluates the project's scope, schedule, cost, and risk and assesses overall executability and constructability given the proposed performance baseline. The EIR will provide an assessment of the project's readiness to baseline and provide specific details of significant findings and observations made by the EIR team. These findings and observations are categorized as: Major Findings, Findings, and Observations.

So what are Major Findings, Findings and Observations?

PM defines Major Findings, Findings, and Observations in the DOE PM *External Independent Review (EIR) Standard Operating Procedures (SOP)*, dated February 2016.

*A Major Finding is any deficiency, condition, shortcoming, error, or omission that affects the project mission, the proposed PB scope, Key Performance Parameters (KPP), TPC, and/or CD-4 schedule...*

It is basically a deficiency, that, in the professional judgment of the EIR team, is of such significance that the project team would not be able to successfully execute the project without that deficiency being corrected prior to CD-2 approval. Major Findings also include any failure by the project team to satisfy all CD or baseline change prerequisites as outlined in DOE Orders. Major findings must be resolved before DOE PM will issue a performance baseline validation memorandum.

Continued on next page...

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations



An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?



## External Independent Review (EIR) – Major Findings, Findings, and Observations

**Mike Fenn, Project Assessments Division (PM-20)**

An example of a Major Finding is that the project funding profile does not support the total project cost estimate or the resource-loaded schedule. The funding profile approved by the PME must be aligned with the total project cost and be appropriately programmed in accordance with the resource-loaded schedule.

*A Finding is any lesser deficiency, condition, shortcoming, error, or omission, which does not impact the project mission, scope, KPPs, TPC, or CD-4 schedule ...*

The EIR team may deem that the deficiency could have an impact on the project scope, KPPs, schedule, quality, safety, and risk management for the project team to successfully execute the proposed PB, unless corrected. A Finding requires a corrective action plan (CAP) developed by the project team that outlines how the Finding will be resolved and when it will be resolved. The CAP developed by the project team must be coordinated and accepted by the EIR team prior to the proposed PB being approved.

A common Finding is that the FPD is not certified at the appropriate certification level for the project being managed.

*Observations are not Findings, but are comments on other project aspects that were evaluated by the EIR team. Observations may be positive, neutral, or negative. Negative Observations typically identify actual or potential project management issues (not considered Findings)...*

The EIR team will provide a recommendation for correcting negative Observations, while Positive Observations highlight project management procedures or processes taken by the project team that merit recognition and may serve as a “lessons learned” for other project teams. Neutral Observations, while neither negative nor positive, may be included to highlight an area reviewed by the EIR team.

Continued on next page...



Home

Director's Corner

External Independent  
Review (EIR) – Major  
Findings, Findings, and  
Observations



An FPD's Perspective on  
a Recent External  
Independent Review

Scheduling Best  
Practices: Assigning  
Resource to All Activities

What is an FPD to do?  
Lead the Team to Project  
Success

New LMS for DOE: The  
Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?



## External Independent Review (EIR) – Major Findings, Findings, and Observations

**Mike Fenn, Project Assessments Division (PM-20)**

An example of a negative Observation is a project team's risk documentation that does not adequately describe risk mitigation activities and their link to risk reduction and responses to realized risks.

The EIR team makes its determination of Major Findings, Findings, and Observations, based on clearly identified and observed nonconformance with stated requirements, such as those in DOE orders, policies, standards and directives. Consistent with industry project management best practices, recognized by the Project Management Institute (PMI), independent expert judgment of EIR team members is also an acceptable basis to make these determinations, particularly, where there may be a perceived weakness in project planning and execution.

All Major Findings, Findings and Observations are documented in an EIR report. Major Findings and Findings are tracked in a Corrective Action Plan tracking log and followed up for closure.



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## An FPD's Perspective on a Recent External Independent Review

**Brian Henry, FPD on Outfall 200 Mercury Treatment Facility**

The Oak Ridge Environmental Management (OREM) Outfall 200 Mercury Treatment Facility (OF200 MTF) recently underwent an External Independent Review (EIR). To prepare for the review, the Integrated Project Team (IPT) reviewed the [EIR Standard Operating Procedure](#) and [DOE G 413.3-9, Project Review Guide for Capital Asset Projects](#) in order to fully understand the EIR process and what the Review Team would consider Major Findings, Findings and Observations. As discussed below, early planning, involvement of participants, and effective communication contributed to a highly collaborative, efficient and effective EIR.

The planning phase began with the development of a notional schedule and document checklists and coordination with the EIR Review Team Lead well in advance of the on-site review. The Review Team Lead scheduled meetings between the IPT and the Review Team beginning 2 months in advance of the onsite review. The IPT and the Review Team engaged in weekly conference calls to plan the review, communicate the approach and expectations of the review and resolve issues. The Review Team received the required documents for review, and questions and additional requests for information were handled in a timely manner. The Review Team drafted the Review Plan, which the IPT reviewed and made suggestions, which was then revised in advance of the onsite review. The approach for the review, down to the details of interview participants and logistics, continued to be refined throughout the process.

This extensive pre-planning and communications throughout between the IPT and the Review Team led to a productive EIR. Both the IPT and Review Team were well prepared and understood the scope and approach for evaluating the project. The EIR Review Team included highly experienced reviewers. The Project Peer Review (PPR) held approximately a year ahead of the EIR was also beneficial in preparing for the EIR as the PPR included appendices containing "Lessons Learned" and "Additional Risk Recommendations". Addressing the recommendations from the PPR was helpful in minimizing findings during the EIR. Onsite interviews were conducted per the pre-established schedule allowing most questions and issues to be resolved during the onsite review itself. A comprehensive out brief was planned and held to communicate findings, observations and preliminary recommendations for early consideration by the IPT.

*Continued on next page...*



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review



Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?



## An FPD's Perspective on a Recent External Independent Review

**Brian Henry, FPD on Outfall 200 Mercury Treatment Facility**

The OF200 MTF EIR did not identify any Major Findings in project planning or baseline development. EIR Findings regarding risk management, integration, and implementation strategies for contract-specific requirements and documents are being used to define and document implementation approaches for project execution in greater detail. By correcting these areas, we anticipate that project management, performance measurement and integration will operate more effectively during MTF construction. The Independent Cost Estimate (ICE) review process and reconciliation was also helpful in ensuring that the project had an executable cost and schedule baseline which minimized optimism biases and reflected best practices.

The Major Findings, Findings and Observations were clearly written and presented to the IPT by the Review Team in the Draft EIR Report. The IPT Factual Accuracy review comments allowed some clarification of facts, which resulted in refinement of the language used for some Observations recommendations. The EIR team lead was very helpful in reviewing the planned corrective actions and suggesting improvements to make them more responsive. The EIR team lead has continued to be engaged in reviewing corrective actions as they are being implemented to insure the project's actions are responsive to the findings.







## Scheduling Best Practices – Assigning Resource to All Activities

Robert Loop, Project Controls Division (PM-30)

The US Government Accountability Office (GAO) has published a [Schedule Assessment Guide \(GAO-16-89G\)](#), which presents ten best practices associated with developing and maintaining a reliable, high-quality project schedule. The Guide also provides principles for use by auditors to evaluate government program and project schedules. This article, the third in a PM-30 series describing various characteristics of high quality schedules that meet the criteria outlined in the GAO Schedule Assessment Guide, discusses resource-loaded schedules (GAO Scheduling Best Practice #3, Assigning Resources to All Activities) which is described as follows:

*The schedule should reflect the resources (labor, materials, travel, facilities, equipment, and the like) needed to do the work, whether they will be available when needed, and any funding or time constraints.*

This is consistent with [DOE Order 413.3B](#) which requires in Attachment 1, *Contractor Requirements Document*, a resource-loaded integrated master schedule (IMS).

All types of resources, labor and non-labor, necessary to perform the project activities should be included in the IMS. This includes Level-of-Effort (LOE), equipment and possibly indirectly charged resources performing discrete work on the project. Schedule Visibility Tasks (SVTs), which should only represent external activities in support of the project (e.g., DOE document review and approval, state permit review and approval, etc.), are not resource-loaded.

### **DOE O 413.3B, Attachment 1 Contractor Requirements Document Paragraph 6**

*An Integrated Master Schedule (both resource-loaded and with critical path) must be developed and maintained for the project. As a minimum, a resource-loaded IMS must contain labor, material and equipment costs to include unit prices and quantities. For firm fixed-price contracts, the total contract cost must be included in the integrated master schedule.*

*Continued on next page...*



## Scheduling Best Practices – Assigning Resource to All Activities

Robert Loop, Project Controls Division (PM-30)

The purpose of resource-loading is to see “achievability”, or, as the guide describes it, since resources are not unlimited, resource-loading and leveling. Leveling may require modifying activity durations so that the resources are more manageable and realistic. Leveling is based on Free Float and Total Float availability using a process described in the GAO guide. Resources which may have limited availability or constraints before they can be engaged are typically modeled with “Start On or After” constraints and justified as to the resource constraint.

Since resource costing is typically done in the contractor’s Earned Value Management System (EVMS) Performance Measurement Baseline (PMB) Cost Tool rather than the Integrated Master Schedule (IMS), this allows various items such as equipment (which may be rented) to be included as non-labor, and indirect resources performing direct PMB scope to be included as labor. Therefore, every activity performing project scope should be represented in the time-phased PMB, and should contain budget and be resource-loaded.

When performing an analysis of the IMS, consider what activities in the project schedule are sequenced concurrently. If a large percentage of activities are either baselined or forecasted to occur concurrently, it is of paramount importance to verify the availability and allocation of resources to validate the realism of the project schedule. The three questions to the right should be considered when determining the adequacy of the resource-loading.

### Resource Loading Questions to Ask

- *Are all activities performing PMB scope defined and resource-loaded?*
- *Are the total resources necessary reviewed for achievability and leveled as appropriate?*
- *Are the resources required justified (e.g., to a basis of estimate) and reconciled to funding restrictions as applicable?*



# What is an FPD to do? Lead the Team to Project Success

Linda Ott, Professional Development Division (PM-40)

You are assigned as the Federal Project Director and are ready to deliver a successful project. You will have an Integrated Project Team to support you. Since you are not executing a project on your own, one of your biggest challenges is figuring out your role and how to effectively perform that role. What is the first thing you need to do?

I just finished a 2-day course, *Progressive Leadership in Projects and Programs*, one of the courses in the Federal Acquisition Institute's Program and Project Management curriculum. The instructor, Mel deGuzman, stated that the fundamental role of the project manager (PM) is to manage and control the events that lead to project completion. He emphasized that the role of the PM is primarily to lead the team and get out of the way so that the work can get done. The instructor illustrated this approach below.

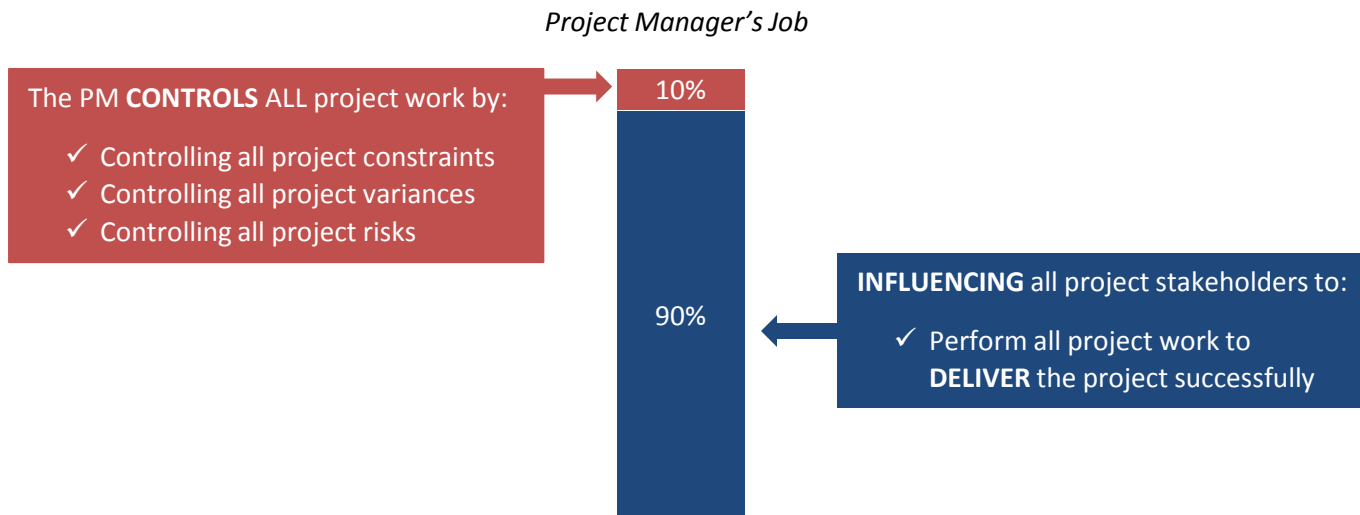


Figure 1. From *Progressive Leadership in Projects and Programs* course

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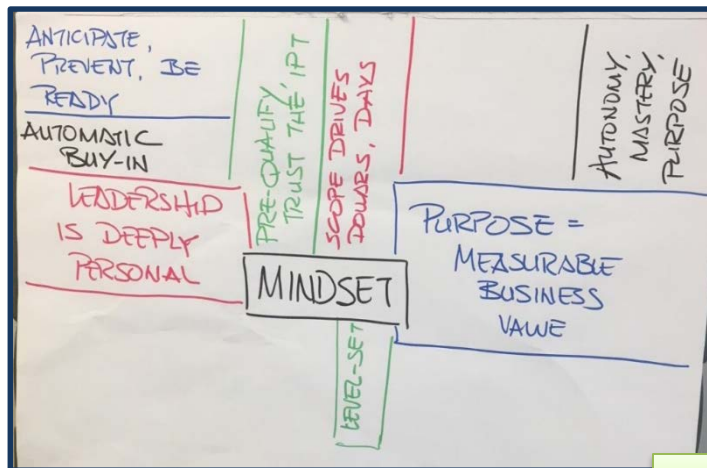


## What is an FPD to do? Lead the Team to Project Success

Linda Ott, Professional Development Division (PM-40)

As shown in Figure 1, 90% of the PM's job is influencing the project stakeholders to work together to execute the project in accordance with the plan that the IPT developed together, which, at DOE, is called the Project Execution Plan. The remaining 10% is ensuring that the project challenges are addressed by the IPT. At DOE, the FPD is much more than a project coordinator. The FPD's role is to drive the project in keeping with the project plans, risks, budget, performance, etc. However, it is even more important to be the project leader, keeping an eye on the project's dynamics and paying attention to your most treasured resource: *People*. The leader does more than just drive projects; they inspire, spur, and galvanize their people to get the job done and move the project forward. The FPD is in command and control of the project, leading and empowering the IPT and project stakeholders to execute the project to successful completion.

If the FPD is managing the relationships with stakeholders and guiding members of the IPT, the team will work together to successfully deliver the project. Throughout the two day course, the instructor emphasized the role of the PM as the control point for the project. Underlying all of this is the mindset of the PM and the importance of the project team's commitment and buy-in. A flipchart from the class shows the mindset of the PM.



Continued on next page...

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## What is an FPD to do? Lead the Team to Project Success

Linda Ott, Professional Development Division (PM-40)

The PM mindset is to anticipate, prevent and be ready to manage project challenges by pre-qualifying and trusting the IPT, so that there is buy-in on the plan to deliver the project. Leadership is deeply personal. While leadership styles are highly variable and personal, to be effective, a PM must have committed followers who are ready and empowered to carry out their expertise when necessary. The PM must have autonomy, mastery of the knowledge and skills required to lead and to embrace the PM's purpose on the project. On DOE's capital asset projects, the project scope drives the budget and schedule. It is therefore up to the FPD to set and manage project expectations and make sure that *everyone* associated with the project has a clear understanding of their role on the project and the ultimate purpose of the project, which is to provide measurable business value.

I hope this insight is valuable to you as you take on the challenging projects assigned to you as FPDs. I hope these leadership nuggets resonate in the PMCDP classes. If you don't find sufficient emphasis in these areas, please provide feedback to me or a member of the Office of Project Management (PM), so we can strengthen the classes.



## New LMS for DOE: The *Learning Nucleus*

Sigmond Ceaser, Professional Development Division (PM-40)



The Office of the Chief Human Capital Officer (HC) has implemented the new Learning Management System (LMS) for the Department of Energy. The new LMS, called the *Learning Nucleus*, streamlines the Department's training operations and improves the user experience. The following PMCDP courses can be accessed in the *Learning Nucleus*:

- DOE PMCDP Environmental Laws and Regulations
- DOE PMCDP Earned Value Management Systems (24/7)
- DOE PMCDP Scheduling
- DOE PMCDP Project Management Essentials

DOE Federal employees can access the courses from [Employee Self Service \(ESS\)](#) without a separate username and password or they can access the courses using the direct link to the [Learning Nucleus](#). The User Name is your DOE email address. Contact the [Learning Nucleus Help Desk](#) to get a temporary password. In the Learning Nucleus Course Catalog, select "DOE Wide Catalog," then "PMCDP."

To access PMCDP courses via ESS...

1. Login into ESS
2. Select "Training" then "Access Training" then "Learning Nucleus"
3. In the Learning Nucleus Course Catalog, select "DOE Wide Catalog," then "PMCDP"

Contractors need to have approval from their DOE Federal supervisor, Learning Nucleus Administrator or Training POC, and PMCDP in order to establish an account. Contact the [Learning Nucleus Help Desk](#) to establish an account. Once an account is established, access the courses using the direct link to the [Learning Nucleus](#). In the Learning Nucleus Course Catalog, select "DOE Wide Catalog," then "PMCDP."

If you have any questions or concerns, do not hesitate to contact the PMCDP.

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# Upcoming Training

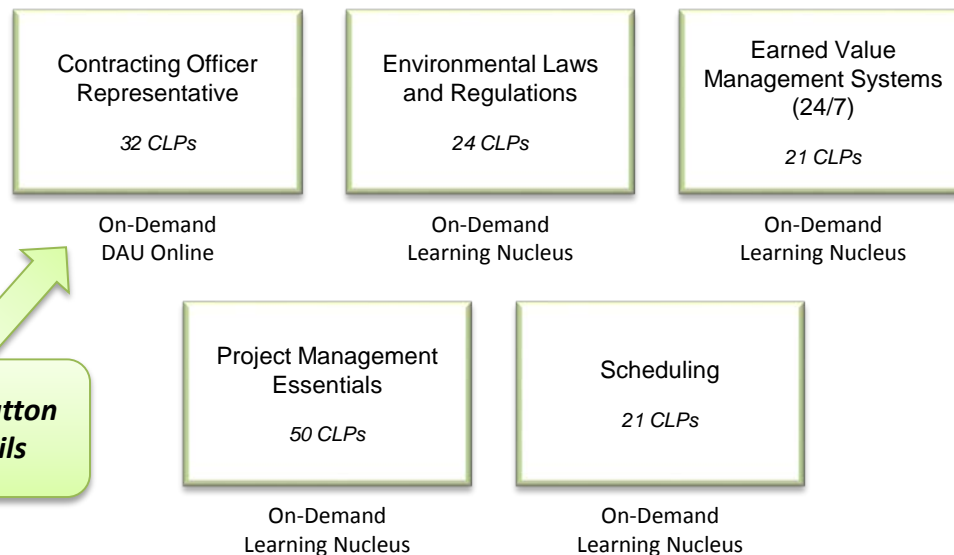
[Click here to view training in July/August](#)

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

*\* To print the FY 2018 Training Strategy, print only pages 32-37 of this document*

## On-Demand Online Training\*\*

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



**Click on any button to view details**



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# Upcoming Training: July – August 2018

Project Management Simulation

5 days / 40 CLPs

July 23 – 27  
Aiken, SC

Managing Contract Changes

4 days / 32 CLPs

July 30 – August 2  
Richland, WA

## Online Training

Advanced Concepts in Project Management

50 CLPs

July 31 – September 25  
Adobe Connect

Value Management

3 days / 24 CLPs

July 31 – August 2  
Chicago/Argonne

Project Risk Analysis and Management

3.5 days / 28 CLPs

August 6 – 9  
Richland, WA

Value Management

3 days / 24 CLPs

August 7 – 9  
EMCBC

## Online Training

Cost and Schedule Estimate and Analysis

5 days / 40 CLPs

August 20 – 24  
Oak Ridge, TN

Acquisition Management for Technical Personnel

16 CLPs

August 21 – 30  
Adobe Connect

Leadership through Effective Communication

3 days / 24 CLPs

August 28 – 30  
Aiken, SC

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Project Management Simulation

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Pro

PMCDP is offering an instructor-led delivery of the 5-day course, *Project Management Simulation*, July 23-27, 2018 in Aiken, SC.

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.

Va

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)

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**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: 001029/0039**

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Managing Contract Changes

X

Pro PMCDP is offering an instructor-led delivery of the 4-day course, *Managing Contract Changes*, July 30-August 2, 2018 in Richland, WA.

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 Required course for the Level 1 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

**CHRIS Code: 002102/0071**

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

X

### Advanced Concepts in Project Management

Pro PMCDP is offering a desktop delivery of the course, *Advanced Concepts in Project Management*, July 31 – September 25, 2018. This course consists of 15 live webinar sessions via Adobe Connect.

This course covers the concepts of project management at an advanced level of expertise, and expands upon best practices in project management from Federal agencies and the private sector. The course introduces a variety of advanced topics and includes a research project for participants to practice applying these concepts to DOE-specific projects. In addition, participants will make formal presentations as part of the course to practice communications skills that are needed to make persuasive well-founded arguments to multiple stakeholders on projects. Stakeholders may include senior management, Congress and the public.

The course focuses on the following topics:

- Project Management Competencies;
- Quality Management;
- Technology Readiness Assessment;
- Project Definition Rating;
- Project Execution;
- Financial Management; and
- Lessons Learned.

**You will earn 50 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: 001023/0043**

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Value Management

X

Pro

PMCDP is offering an instructor-led delivery of the 3-day course, *Value Management*, July 31-August 2, 2018 in Chicago, IL (Argonne).

Value Management (VM) provides participants with techniques for re-examining projects with a view to reducing total project costs. Designed for Federal and contractor personnel from Senior Managers to Project Directors and their extended teams, the course includes an overview of VE/VM concepts, principles, and definitions, and the various legal and regulatory drivers that now mandate its application. It also focuses on building skills and understanding for applying VE/VM practices, tools and techniques to improve project and program cost and schedule results, especially Return on Investment (ROI).

Va

This course also teaches skills for organizing a VM effort, structuring a job plan, and analyzing the functions of systems, equipment, facilities and supplies to achieve the lowest life-cycle costs while maintaining the essential values of safety, performance, reliability, and quality. The course applies modern practices in the field of Value Engineering and Value Management (VE/VM) that emphasize good communications and effective leadership of the people involved.

**You will earn 24 continuous learning points for this course. This is an Elective course for the Level 2 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

**CHRIS Code: 001037/0019**

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# Upcoming Training: July – August 2018



## Project Risk Analysis and Management

Pro PMCDP is offering an instructor-led delivery of the 3.5-day course, *Project Risk Analysis and Management*, August 6-9, 2018 in Richland, WA.

This course is designed to prepare Federal Program or Project Managers to:

- Determine project risks and develop risk management and mitigation strategies;
- Determine at which points in a project life-cycle risk analyses should be performed;
- Evaluate potential risk probability and consequences;
- Determine risk factors;
- Select risk management or mitigation strategies; and
- Develop a risk management plan.

Va Participants also acquire the skills that enable them to:

- Assign risk responsibility between Federal agencies and contractors;
- Determine appropriate project cost and schedule contingencies for identified risks;
- Determine appropriate project management and project control tools to assist in managing identified risks; and
- Evaluate project Estimates at Completion (EAC) and remaining contingencies to determine adequacy of funds.

**You will earn 28 continuous learning points for this course. This is a required course for the Level 1 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

Co CHRIS Code: 001033/0056  
Esti

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Value Management

X

Pro

PMCDP is offering an instructor-led delivery of the 3-day course, *Value Management*, August 7-9, 2018 at EMCBC.

Value Management (VM) provides participants with techniques for re-examining projects with a view to reducing total project costs. Designed for Federal and contractor personnel from Senior Managers to Project Directors and their extended teams, the course includes an overview of VE/VM concepts, principles, and definitions, and the various legal and regulatory drivers that now mandate its application. It also focuses on building skills and understanding for applying VE/VM practices, tools and techniques to improve project and program cost and schedule results, especially Return on Investment (ROI).

Va

This course also teaches skills for organizing a VM effort, structuring a job plan, and analyzing the functions of systems, equipment, facilities and supplies to achieve the lowest life-cycle costs while maintaining the essential values of safety, performance, reliability, and quality. The course applies modern practices in the field of Value Engineering and Value Management (VE/VM) that emphasize good communications and effective leadership of the people involved.

**You will earn 24 continuous learning points for this course. This is an Elective course for the Level 2 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

**CHRIS Code: 001037/0018**

Co  
Esti



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Cost and Schedule Estimate and Analysis

X

Pro

PMCDP is offering an instructor led delivery of the 5-day course, *Cost and Schedule Estimate and Analysis*, August 20-24, 2018 in Oak Ridge, TN.

This course provides participants with a high-level overview of cost and schedule estimation techniques necessary for successful project management. Participants receive practical skills training on how to develop independent cost and schedule estimates and how such estimates factor into a project's baseline. The course teaches skills used across the project life cycle, but focuses on estimates developed in project planning and the early stages of project execution (preliminary design).

Topics include:

- Identifying cost and schedule estimates;
- Basic estimating methods;
- Group analysis techniques;
- Applying life-cycle costing techniques;
- Validating estimates;
- Determining critical path schedule for a project;
- Crashing and fast-tracking methods; and
- Relationship between budget authorization and budget outlay schedules, project estimates, and the project funding profile.

**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: 001044/0033**

Co  
Esti

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Acquisition Management for Technical Personnel

X

Pro

PMCDP is offering a pilot desktop delivery of the course, *Acquisition Management for Technical Personnel*, August 21-30, 2018 via Adobe Connect.

Every year the Department of Energy spends over 90 percent of its budget on purchases from the private sector. Because of the Federal Government's special fiduciary relationship, the acquisition system established to manage these expenditures of taxpayer monies is very different in some respects from commercial transactions between private parties. The principal purpose of the DOE acquisition system is to deliver on a timely basis the best value product or service to the customer while adhering to the laws, regulations, policies, and directives of the United States Government and the Department. This course examines the portion of the acquisition process commonly referred to as "procurement." This part of the process typically begins with the completion of the acquisition strategy and the development of the acquisition plan. The process proceeds through development of a solicitation, solicitation and evaluation of proposals, and contract award. Another course (see below), *Contract Administration for Technical Representatives*, continues through contract administration and contract closeout (although these topics are summarized at the end of this course to provide a complete picture of the acquisition process).

**You will earn 16 continuous learning points for this course. This is a Required course for the Level 1 PMCDP certification for Federal Project Directors and is available to all DOE employees.**

**CHRIS Code: 000145/0046**

Co  
Esti

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training: July – August 2018

### Leadership Through Effective Communication

X

Pro

PMCDP is offering an instructor-led delivery of the 3-day course, *Leadership Through Effective Communication*, August 28-30, 2018 in Aiken, SC.

This course is a highly interactive session focused on developing powerful communication skills to lead people and manage projects. The course emphasizes personal communications preferences and the impacts of these preferences on others, and provides tips and techniques for maximizing effectiveness in leading project teams. Skills-based lessons include:

- The use of different communications styles
- Techniques for managing conflict
- Giving and receiving feedback
- Decision-making

Va

The course provides a practical and effective toolkit for communicating in a project-focused environment, and a resource list for continuous learning.

**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: 002366/0032**

Co  
Esti

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training

X

### 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.**

Learning Nucleus

Learning Nucleus

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training

X

### 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

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training

X

### 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

**X**

### 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](#)

Learning Nucleus

Learning Nucleus



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# Upcoming Training

X

## Project Management Essentials

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

Learning Nucleus

Learning Nucleus

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Upcoming Training

X

### 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

 [Back to the Newsletter](#)



FY2018 PMCDP Schedule (4/24/2018)

**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

[Back to the Newsletter](#)



FY2018 PMCDP Schedule (4/24/2018)

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

 [Back to the Newsletter](#)



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

[Back to the Newsletter](#)

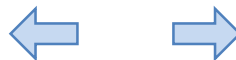


FY2018 PMCDP Schedule (4/24/2018)

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>



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## Recently Certified

The following certifications were recently issued.

### Federal Project Directors

#### EM

- Brian Henry - Level 2
- Nathan Felosi - Level 2
- Victor Agege - Level 1

#### NNSA

- Laurie Folden - Level 3

#### NE

- Kyle Vogel - Level 1

**Congratulations to our newly certified members!**

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## PM Values Your Feedback

*Click on any of the buttons below to view the details*

On DOE's Policies

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## PM Values Your Feedback

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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. Send citations of errors, omissions, ambiguities, and contradictions to [PMpolicy@hq.doe.gov](mailto:PMpolicy@hq.doe.gov). Propose improvements to policies at <https://hq.ideascale.com>.

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## PM Values Your Feedback

*Click on any of the buttons below to view the details*

On DOE's Policies

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

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](mailto: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>

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## PM Values Your Feedback

*Click on any of the buttons below to view the details*

On DOE's Policies

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

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](mailto:PMCDPOnlineCourseSupport@hq.doe.gov)

Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

## PM Values Your Feedback

*Click on any of the buttons below to view the details*

On DOE's Policies

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

Can't find the Word templates to prepare 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](mailto:PMCDP.Administration@hq.doe.gov) mailbox.



Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

Upcoming Training



Recently Certified

PM Values Your Feedback

Questions/Comments?

# PM Values Your Feedback

Click on any of the buttons below to view the details

On DOE's Policies

On PARS

On PMCDP's Online Courses Through the Learning Nucleus

On the PMCDP Application in ESS

On PM-MAX

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Home

Director's Corner

External Independent Review (EIR) – Major Findings, Findings, and Observations

An FPD's Perspective on a Recent External Independent Review

Scheduling Best Practices: Assigning Resource to All Activities

What is an FPD to do? Lead the Team to Project Success

New LMS for DOE: The Learning Nucleus

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Questions/Comments?

## 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.

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