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Paul Bosco,
Director of the
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A new fiscal year is quickly upon us. For the first time in more than 10 years, Congress has actually sent more than one appropriations bill to the President's desk prior to the end of a fiscal year! This marks a major milestone by the House and Senate to return to "regular order" – which means completing all 12 funding bills through the normal legislative process and enacting them into law prior to the end of the fiscal year. For all our project managers, this may mean a major risk mitigation has just occurred – FY19 funds are available at (near) the start of the new fiscal year. Something worthy of note.

On a related topic, each year my office reviews the Department's annual Congressional Budget Request (CBR) packages for all of the Programs focusing on capital asset projects and the Project Data Sheets (PDS) for line item projects. One of the featured articles this month discusses the Office of Project Management's (PM) role in budget reviews; namely, validating that our project teams are getting the dollars they need consistent with the funding profiles approved at CD-2. Said another way, our project teams cannot be held accountable for project execution success if they are not getting the resources they need, when they need them. We try to highlight areas of concern, if any, upfront.

Now that summer is over and the kids are back to school, maybe we should follow their lead; take a few classes. Assuming scope does not change, what is the best way to track your project's cost and schedule performance? What is the best way to handle Level of Effort (LOE) work when using the Earned Value Management (EVM) on, say, Title III work? What are the latest risk management techniques?

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If your curiosity is piqued, then one of our featured articles this month may be helpful. You may have to take one of our PMCDP classes to answer these questions. And, may I recommend the EVMS online course or the Advanced EVM instructor-led course? The PMCDP classes are good courses to periodically take (or retake to refresh) as we collectively strive for project management excellence.



Paul Bosco,
Director of the
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Keep Charging!

Sincerely,
Paul Bosco

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The Office of Project Management's Role in the Federal Budget Formulation Process

Jeff Thomas, Office of Project Assessment (PM-20)

The Office of Project Management (PM) is an important part of the Department of Energy's budget formulation process. Each year, in September and early January, PM reviews the Department's annual Congressional Budget Request (CBR) packages for all Programs, with a specific focus on capital asset projects and Project Data Sheet (PDS) for line item projects to ensure compliance with DOE Order 413.3B budget related provisions. PM's comments are provided to the Office of the Chief Financial Officer (CFO), who coordinates resolution of PM's comments with the respective Programs. Once the PDS's are deemed adequate, the CFO staff rolls up the documents to be submitted to the Office of Management and Budget (OMB) in September for further review and the final package eventually makes it to Congress in early February.

The PM review performed in September is generally the first look that PM has on new and updated PDS's. This is PM's opportunity to alert the CFO to areas in the PDS's that are potentially not compliant with DOE Order 413.3B so that the shortcomings and changes can be addressed. CFO coordinates with the Programs for specific issue resolution (though PM will also provide via memo any summary of DOE Order 413.3B compliance issues that are identified). The early January review is to ensure that any change requirements or missing elements have been incorporated prior to the final CBR being submitted to Congress. The format of a PDS is provided below:

- Significant Changes
- Critical Decision (CD) and Decommissioning and Demolition (D&D) Schedule
- Baseline and Validation Status
- Project Description, Justification, and Scope
- Financial Schedule
- Details of Project Cost Estimate
- Financial Schedule
- Schedule of Appropriation Requests
- Related Operations and Maintenance Funding Requirements
- Required D&D Information
- Acquisition Approach

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Jeff Thomas, Office of Project Assessment (PM-20)

The PDS forms a formal basis for the Department's communication about a particular line item project to OMB and ultimately to Congress. The information in the PDS then becomes, in large part, the basis for how Congress will accommodate the project (i.e., authorize and appropriate funding, provide direction including studies to be performed). Compliance with departmental policy and project management best practices as codified in DOE Order 413.3B is an important aspect that OMB and Congress consider when evaluating their support of a project.

PM is tasked with ensuring that all aspects of each PDS is fully aligned with the Order. PM reviews each section of the PDS and provides comments accordingly. Below are some specific focus areas with the associated response actions:

- **Does the project have CD-0 before requesting project specific funds?**
 - If not, then the PDS cannot be submitted to OMB.
- **Does the project have CD-1 before requesting funds for construction?**
 - If not, then a PMRC endorsement and an Under Secretary approval via the DOE Order 413.3B exemptions process is required.
- **Have two years passed since a project requested funds for construction and has not yet obtained CD-2 or CD-3A?**
 - If not, then must obtain the Deputy Secretary's approval before requesting additional funds for construction.
- **Is there an accurate depiction of CD dates, inclusive of CD-3A, if applicable?**
 - If not, then revision by the Program is required.
- **Is the requested funding profile in alignment with that approved when baselined at CD-2 or re-baselined?**
 - If not, then PM and CFO notification is required prior to the endorsement by the Project Management Executive (PME).

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The Office of Project Management's Role in the Federal Budget Formulation Process

Jeff Thomas, Office of Project Assessment (PM-20)

PM's role in reviewing the PDS's helps to ensure that the Department is providing the best and most accurate information available to OMB and Congress, while ensuring compliance with our Departmental project management directive. This, along with managing the projects successfully, enhances stakeholder confidence in the Department's management of appropriated funds.

For additional information, or if you have any questions, contact your project analyst in PM-20.

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Earned Value Technique: Construction Support as LOE

Melvin Frank, Office of Project Controls (PM-30) EVMS Compliance Team

Lately, there has been much discussion in the project controls community addressing the use of Level of Effort (LOE) Earned Value Technique (EVT) for construction support such as Title III (T3) Engineering. This article, which updates techniques on LOE offered in prior articles (December 2017 and February 2018 PM Newsletters), offers a way to handle such support work as LOE in a manner that is compliant with the EIA-748 standard, is consistent with EFCOG's generally preferred approach, and is practical, effective, and cost efficient. This approach avoids the difficulty one would encounter trying to apportion T3 work to discrete activities since it is not directly proportional. It also requires far less work than would be required measuring T3 with the PERT/cost method. Review the following graphic which shows the basic steps suggested for management of such work. [[Click here for Figure 1: Construction Support LOE Model](#)]

This method retains the LOE approach for T3 readiness to serve support work scope utilizing Estimate to Complete (ETC) activities in the forecast Integrated Master Schedule (IMS) once specific T3 work exceeding a pre-defined threshold is identified. Thresholds should be project-specific, depending on project size and complexity. Discrete work scope with design conflicts relies upon the T3 work scope to resolve engineering design issues on an as needed basis during the construction phase. Conflicts are handled using ETC forecast activities embedded within the discrete work scope in the schedule to reflect the work needed for resolution. While technically being performed by the LOE account, the work becomes essentially discrete as it is associated with the performance of the baseline plan. In essence, it becomes discrete (albeit unbudgeted) activities in the forecast schedule by the very nature of its usage.

Technically speaking, a non-resourced ETC only activity has no performance measurement designation, neither discrete nor LOE because it has no budget. Therefore, the LOE work scope activity is not driving the discrete work scope activity. Following this approach, the contractor will need to be diligent in maintaining the T3 LOE work. At no time should the T3 LOE work be stasured as 100% complete prior to the underlying discrete work being 100% as well. For example, if the resolution of engineering design issues extends the forecast schedule for the affected discrete work beyond the baseline schedule, the contractor will be

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required to use its formal change control process to re-baseline (not increase) the remaining budget completion date of the LOE work to align with the forecasted schedule extension of its associated discrete work. Using non-resourced ETC only activities will also provide added visibility into the T3 work efforts; the where, when, and how much are delineated. This can be valuable information for decision-making and future cost estimates.

For example, a design conflict (Event 1 in the following illustration [[Click here for Figure 2: Title III EPC Concept](#)]) may require the project to revise a drawing to capture an as-built condition. This could be a situation where a pipe hanger could not be physically installed per the approved drawing due to constraints such as placement of a wall or piece of equipment. When this occurs, T3 readiness-to-serve work scope which overlays the discrete construction scope will be used to help identify and resolve the design conflict in the manner shown in the previous graphic. [[Click here for Figure 1: Construction Support LOE Model](#)]

For purposes of Earned Value Management, the delay and possible cost overrun is reflected in the baseline plan through an unfavorable schedule variance until the conflict is resolved and the construction work scope having the conflict is completed. This could result in an estimate at complete (EAC) increase for both the discrete and LOE work scopes. The forecast IMS will reflect the conflict using non-resourced ETC only activities which are logically tied to other discrete construction work scope activities to reflect the delay and possible impact to the project critical path and overall timeline. The LOE readiness-to-serve support scope and budgeted cost of work remaining would be adjusted to align with the remaining duration of the discrete construction work scope.

In alternate cases where the plan is modified to add new scope [[Click here for Figure 2: Title III EPC Concept](#)], either to the distributed Performance Measurement Baseline (PMB) but within the Contract Budget Base (i.e., in-scope to the contract; risk realization/Management Reserve utilization), or the

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customer has directed a change to the plan (i.e., out-of-scope to the contract; contingency utilization), the use of the EVMS change control process is required, for the distribution of budget to the PMB and incorporation of additional activities to the baseline IMS.

If there are further questions regarding this article or approach please contact PM-30 (<https://community.max.gov/display/DOEExternal/PM+EVM+SMEs>).

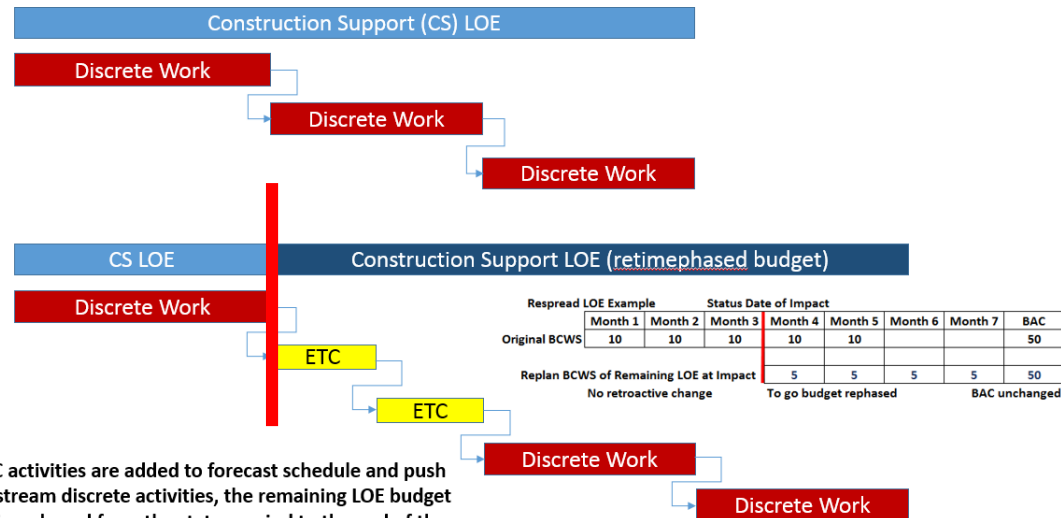


Earned Value Technique: Construction Support as LOE

PM-30 EVMS Compliance Team

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Figure 1: Construction Support (e.g., T3) LOE Model



As ETC activities are added to forecast schedule and push downstream discrete activities, the remaining LOE budget is re-timephased from the status period to the end of the forecast date

1. The PMB shows Construction Support such as T3 as an LOE EVT lasting from start to finish of construction.
2. If a significant technical/design issue that will impact the schedule arises during construction, zero-budget construction support work activities should be added to the forecast schedule and sequenced using precedence logic with the discrete construction work it is impacting.
3. The PMB-budget does not change; rather, cost and schedule variances are incurred.
4. Full earned value (BCWP) for the baseline construction support LOE activity can only be claimed when the last discrete activity has been completed.
5. The handling of T3 work scope should be fully addressed in the Earned Value Management System Description, including the establishment of a threshold level for when ETC activities (aka, zero budget activities) should be added to the forecast schedule.

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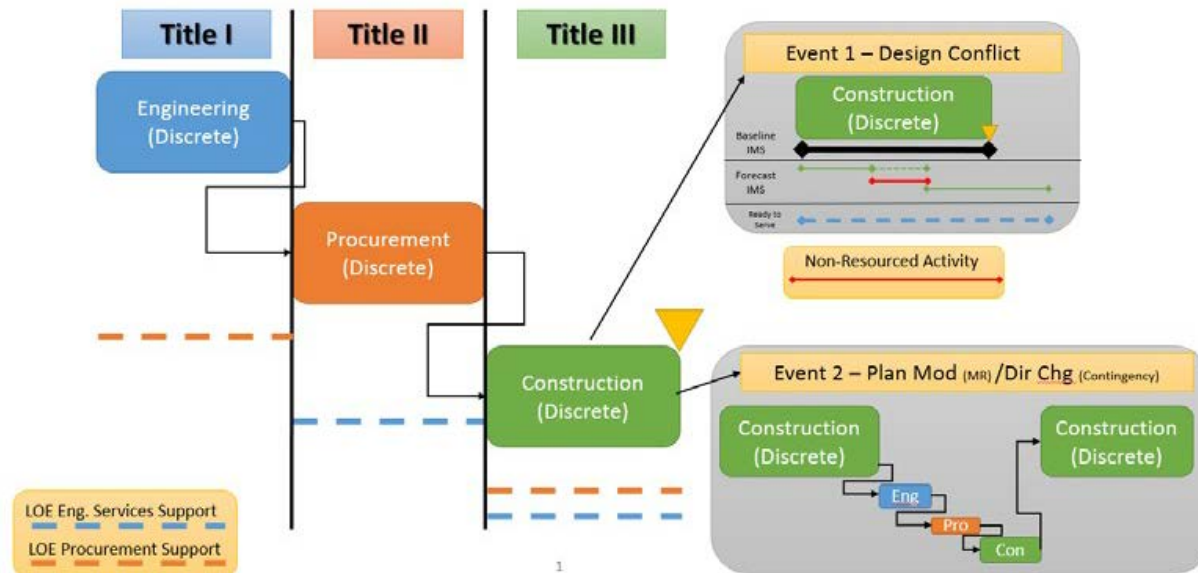
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Figure 2: Title III (EPC Concept)



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PARS Update

Matthew (Zac) West, Performance Team Lead Office of Project Controls (PM-30)

A new PARS reporting period will open for October 2018 (for August 2018 contractor upload data), and the September period will close on the 26th of September. Users will be able to begin their monthly assessment process according to the below processing schedule:



Wednesday, 9/26: New reporting period opens. FPDs, Program Analysts, and PM analysts may begin entering their monthly assessments.



Friday, 9/28: (last business day of each month): Contractors must finalize the upload of their CPP files.



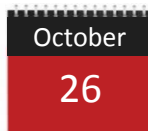
Wednesday, 10/3: (third business day): FPDs must finalize their monthly assessments.



Tuesday, 10/9: (sixth business day): Programs must finalize their monthly assessments.



Friday, 10/12: (ninth business day): 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>. It is recommended that if you have a previous URL saved within your Favorites/Bookmarks, you delete it as soon as possible as the previous URL will not redirect to the production PARS application. The easiest way to do this is simply 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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Newly Revised Guides Published

Mike Myers, Office of Policy & Program Support (PM-50)

PM announces the recent revision of DOE Guide 413.3-9A, *Project Reviews* and DOE Guide 413.3-15A, *Project Execution Plans*, both of which provide non-mandatory guidance and best practices for complying with requirements found in DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*.

The Project Reviews Guide outlines the what, why, when, who, and where of project reviews required within DOE O 413.3B. The guide includes a one-page table illustrating which reviews are required before each critical decision milestone. It also contains links to further guidance for each review type. The new format provides a handy reference and enhances advance planning to help federal project directors and integrated project teams take full advantage of the Department's project review best practices.

The Project Execution Plans Guide provides an annotated outline for preparing a PEP, the primary instrument for documenting PME direction to the project team and outlining federal plans for project execution. This update aligns language in the guide with the current revision of DOE O 413.3B, refreshes references, and updates best practices from programs and field offices. While project teams have significant flexibility in formatting their PEPs, this guide offers a strong starting point to ensure a comprehensive PEP.

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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FPD Spotlight: Lisa Nicholson, Strategic Petroleum Reserve



Lisa Nicholson, FPD, Strategic Petroleum Reserve (SPR) Life Extension Phase 2 (LE2) Project shares her thoughts on the Project Definition Rating Index (PDRI) process as LE2 completes 30% design and moves forward into detailed design supporting Critical Decision- 2/3 approval planned for early FY 2020.

“The original SPR (1976) last conducted a life extension program in 1999 called the Life Extension Phase 1 (LE1). The current LE2 project mission will upgrade equipment and process systems from 2025 to 2050, ensuring strategic and economic protection against disruptions in oil supplies in meeting U.S. obligations under the International Energy Program. The LE2 approved cost range was \$750M - \$1.4B, however, to improve resiliency, secondary wells will need to be drilled into caverns at three sites, increasing the cost range to \$1.1B - \$1.6B [\[click here for LE2 details\]](#).

My biggest management challenge to date is the uncertainty of the SPR future mission, potentially impacting LE2 scope beyond control of the Integrated Project Team (IPT). We completed contingency plans for some of the options being considered, allowing for the latest possible implementation decision.

This was our third PDRI exercise to position LE2 for success. We recently added new team members on both DOE and Management & Operating (M&O) contractor teams, implemented scope changes, and completed 30% design. My three PDRI goals were to: (1) substantiate project maturity in observing how well new team members assimilated with the established team structure, (2) determine whether processes and equipment met our design goals, and (3) develop an action item list to move 60% design activities forward. As FPD, I was responsible for pairing the real-time project status with the IPT's response to PDRI assessment questions. This became an interesting challenge as I began to question “whether the project was really complete with 30% design” since we still had to convert comments from our prior two PDRI's into milestones that properly defined the design phases. Once this PDRI session was over, we had to circle back and re-confirm our path to complete.

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For the LE2 and SPR, I am trying to establish the PDRI process as a planned project management process (like performing design reviews, constructability reviews, or process hazard analysis). Since it was our third PDRI for the LE2 project, we had sufficient time to discuss and agree on every item we knew was under control. This PDRI session was completed post-CD-1, so the resulting action items are expected to lead to CD-2/3 approval and successful completion of the required external independent review. We plan to conduct two more PDRI assessments to verify alignment and maturity at 60% and for the EIR at 90% design completion). We intend to position the project for success by thoroughly planning our approach (i.e., avoid reacting on the fly). IPT lessons learned included the value of displaying the PDRI forms during the event and appointing a scribe as an exclusive note-taker. Depending on timing and work load, I or my trained PDRI FPD, Scott Denneau, could be made available to consult with FPDs at other field sites. ”

Fun Facts!

I love a challenge and project management always has one or more waiting. I've worked at DOE for 29 years (almost 28 on SPR). I joined the SPR as the Drawdown Engineer during [Operation Desert Shield](#) which presented a swift opportunity to learn about many aspects of the organization. I have a BA and MS in Electrical Engineering from Tennessee Technological University in Cookeville, TN. I've been married 26 years, have 2 rescue dogs, and also race a modified 2009 Dodge Challenger, ¼ mile, ½ mile, and standing mile (top speed 185.3 in standing mile and quickest quarter mile 11.2 seconds). I am originally from Tennessee, but living in New Orleans provides so many things to do: we love live music and the food is awesome.



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An Intern's Perspective: A Peer Review of the Advanced Light Source Project

Stefan Adebajo, 2018 Summer Intern in the Office of Project Management

When most people hear “Berkeley” perhaps the first thing they think of is its prestigious university. However, in the hills above the beautiful and ve,nerated campus lies the Lawrence Berkeley National Laboratory (LBNL), an institute that holds numerous Office of Science user facilities for the DOE. This summer, during my internship with the Office of Project Management (PM), I was invited to join Mr. Jeff Thomas and travel to the Berkeley National Lab to observe a project peer review on the proposed upgrade the Advanced Light Source (ALS). The experience was extremely rewarding. I enjoyed spending time with the intelligent and laid back Jeff Thomas, with whom I had thoughtful conversations and thankfully provided interpretation for the intense vocabulary of the project. Mr. Thomas facilitated introductions between me (an intern or “DOE scholar”) and Ph.D. intellectuals. It was difficult catching all the terms being thrown in my direction, and I admit to getting lost more than a couple times.

The depth of my newness can be summed up with my encounter with a scientist, who during a lunch break, came up to me and proceeded to explain how the electrons in the ALS beam should be split and directed around the booster to increase time efficiency. The man delivered his opinions to me in scientific terms and a casual tone such that we could have easily been talking about the outcome of a baseball game. At the end of this very one-sided conversation, the man reassured me that it was “simple physics” to which I replied “yes, of course”, thanked him and walked away with my lunch, more confused and almost forgetting the reason I had just bought lunch.

My goal, when it came to the ALS review, was to stay motivated and determined through each day of the review. I tried my best to keep up with the ideas and concepts presented, and the pace of the review. I understood that no one was going to wait for me to catch up, nor did I want them too. The review for me was an exercise in taking in data and quickly analyzing and converting it into comprehensible information. I am proud to report that my hard work paid off, and by the last day of the conference; I was able to make some suggestions to the cost analysis team that were taken into account and presented in their final assessments.

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Stefan Adebajo, 2018 Summer Intern in the Office of Project Management

Berkeley was not all work, however. Again, thanks to Mr. Thomas, I was able to, for the first time, explore a bit of the west coast. We ate delicious food in San Francisco's vibrant and authentic Chinatown, climbed the rolling streets of the city, gazed at the notorious Alcatraz, and a few hours before my flight finally tried the famous In and Out Burger. In Berkeley, I visited with the local student population and enjoyed the breeze at a marina near our hotel.

My summer internship with the Office of Project Management will have a lasting impact on me. I extend my gratitude for the opportunity.

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24 CLPs

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Aiken, SC

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and Techniques

24 CLPs

October 31 – December 12
Adobe Connect

Executive
Communications

3 Days / 24 CLPs

November 28-30
Washington, DC (EERE)

Project Risk Analysis
and Management

3.5 days / 28 CLPs

November TBD
New Orleans, LA (SPR)

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Advanced Earned Value Management

PMCDP is offering an instructor-led delivery of the 3-day course, *Advanced Earned Value Management*, October 16-18, 2018 in Aiken, SC.

This course focuses on the senior-level business, cost, and financial management competency, as defined by the latest FAC-P/PM policy, and will help you harness the power of EVM to control your programs. The course also will enable you to create and utilize a realistic performance measurement baseline (PMB), and provide management with information at a practical level. Finally, as part of the course activities, you will prepare an action plan to create immediate impact on your control of projects.

Participants will:

- Oversee the application of total life-cycle systems management
- Demonstrate knowledge and appropriateness of cost estimating processes, methods, and techniques
- Demonstrate knowledge of analytical principles, data, and confidence bands
- Understand OMB Circular A-11 application, including the documentation processes that are employed in the development and decision making of an agency's total federal fiscal activity

You will earn 24 continuous learning points for this course. This is a required course for the Level 3 PMCDP certification for Federal Project Directors and is available to all DOE employees.

CHRIS Code: 002689/0013

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Negotiation Strategies and Techniques

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PMCDP is offering a desktop delivery of the course, *Negotiation Strategies and Techniques*, October 31 – December 12, 2018 via Adobe Connect. Webinars will be held Wednesdays from 11:00 am – 12:30 pm Eastern.

In this course, participants learn about collaborative and competitive negotiations, negotiation strategy and planning, negotiations within and between teams, identifying key stakeholder interests in negotiations, determining best alternatives to negotiated agreements, and effectively communicating during negotiations. Through reading assignments from Harvard Law School's prestigious Program on Negotiation and mini case studies customized for the Department of Energy, participants are introduced to methods to improve their performance in negotiating agreements. Participants then practice using learned strategies during the course.

The webinar schedule is as follows:

1. October 31, 2018
2. November 7, 2018
3. November 14, 2018
4. November 28, 2018
5. December 5, 2018
6. December 12, 2018

You will earn 24 continuous learning points for this course. This is an elective course for the Level 3 PMCDP certification for Federal Project Directors and is available to all DOE employees.

CHRIS Code: 001047/0026

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Executive Communications

PMCDP is offering an instructor-led delivery of the 3-day course, *Executive Communications*, November 28-30, 2018 in Washington, DC (EERE).

This course helps you take a nimble approach to leading project managers, managing direct reports and managing the expectations of senior audiences. This course focuses on the senior-level leadership competency, as defined by the latest FAC-P/PM policy, and will take a deep dive into managing relationships, communication, conflict management, and diversity with an eye to building and maintaining a high-performance team. By the end of the course, participants will know how to strategically position the organization to take advantage of new opportunities by developing and improving products and services. Participants will also have the skills needed to facilitate effective business partnerships with the CO, CAO, senior-level agency advisors, and other business advisors and program stakeholders. Finally, participants will be able to identify, assess and resolve programmatic problems, and use sound judgment to identify corrective courses of action.

You will earn 24 continuous learning points for this course; this is a required course for the Level III PMCDP certification for Federal Project Directors and is available to all DOE employees.

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Project Risk Analysis and Management

PMCDP is offering an instructor-led delivery of the 3.5-day course, *Project Risk Analysis and Management*, tentatively scheduled for November 2018 in New Orleans, LA (SPR).

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.

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.

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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.

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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.

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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 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

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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.

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Advanced Earned Value Management CHRIS Code: 002689/0013 Gary Humphreys	3 Days 24 CLPs	October 16-18	Classroom SRS, Aiken, SC Leatrice Green
Negotiation Strategies and Techniques CHRIS Code: 001047/0026 Peter Bonner	24 CLPs	Wednesdays 11-12:30pm October 31-December 12 (6 webinars, exam, eval)	Adobe Connect
Executive Communications CHRIS Code: 001031/0041 Shelley Simms	3 Days 24 CLPs	November 28-30	Washington DC (EERE) Lisa Weber
Project Risk Analysis and Management CHRIS Code: 001033 Sean Casey	3.5 Days 28 CLPs	November TBD	SPR, New Orleans
Capital Planning for DOE O 413.3B CHRIS Code: 002152/0014 Sean Casey	16 CLPs	Tue/Thursdays 1-4pm November 27-December 18 (5 webinars, exam, eval)	Adobe Connect
Labor Management CHRIS Code: 001038/0014 Don Musacchio	3 Days 24 CLPs	December 4-6	EERE, Golden, CO Lisa Weber
Managing Contract Changes CHRIS Code: 002102/0072 Jerry Zimmer	4 Days 32 CLPs	December 10-13	Oak Ridge, TN Peter Rivera



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Facilitating Conflict Resolution CHRIS Code: 001558/0027 Peter Bonner	24 CLPs	Wednesdays 11am-12:30pm January 30-March 13 (5 webinars, exam, eval)	Adobe Connect
Leadership through Effective Communication CHRIS Code: 002366/0034 Mac Bogert	3 Days 24 CLPs	January 15-17	Golden, CO Lisa Weber
Leadership through Effective Communication CHRIS Code: 002366/0035 Mac Bogert	3 Days 24 CLPs	January 22-24	Oak Ridge, TN Peter Rivera
Project Management Systems and Practices in DOE CHRIS Code: 001024/0049 Dana Krupa	60 CLPs	Tue/Thursdays 1-3pm January 22-March 12 (11 webinars, exam, eval)	Adobe Connect
Advanced Risk Management CHRIS Code: 001042/0026 Chris Gruber	4 Days 28 CLPs	January 29-February 1	Golden, CO Lisa Weber
Strategic Planning CHRIS Code: 001043/0018 Marvin Gunn	3 Days 24 CLPs	February 19-21	Golden, CO Lisa Weber
Program Management and Portfolio Analysis CHRIS Code: 001025/0035 Larry Suda	5 Days 40 CLPs	February 4-8	Oak Ridge, TN Peter Rivera

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Project Risk Analysis and Management CHRIS Code: 001033/0057 Sean Casey	3.5 Days 28 CLPs	March 5-8	Golden, CO Lisa Weber
Performance Based Management Contracting CHRIS Code: 001951/0028 Jerry Zimmer	3 Days 24 CLPs	March 12-14	Berkeley, CA Lauren Martinez
Scope Management Baseline Development CHRIS Code: 001036/0030 Sean Casey	3 Days 24 CLPs	March 12-14	Oak Ridge, TN Peter Rivera
Value Management CHRIS Code: 001037 Jeff Rude	3 Days 24 CLPs	Quarter 2 TBD	Richland, WA
Federal Budgeting Process in DOE CHRIS Code: 001034 Alice Murphy	4 Days 32 CLPs	Quarter 2 TBD	SPR, New Orleans
Project Management Systems and Practices in DOE CHRIS Code: 001024 Dana Krupa	60 CLPs	Quarter 2 TBD	Adobe Connect
Managing Contract Changes CHRIS Code: 002102 Jerry Bertrand	4 Days 32 CLPs	Quarter 2 TBD	SPR, New Orleans



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Managing Contract Changes CHRIS Code: 002102 Jerry Bertrand	4 Days 32 CLPs	Quarter 2 TBD	Oak Ridge, TN
Strategic Planning CHRIS Code: 001043 Marvin Gunn	3 Days 24 CLPs	Quarter 2 TBD	Golden, CO
LEED for New Construction and Existing Buildings CHRIS Code: 001936 Jason Kliwinski	2.5 Days 20 CLPs	Quarter 2 TBD	SPR, New Orleans
Advanced Concepts in PM CHRIS Code: 001023/0044 Dana Krupa	50 CLPs	Tue/Thursdays 1-3pm April 2-June 6 (15 webinars, exam, eval)	Adobe Connect
Managing Contract Changes CHRIS Code: 002102 Jerry Bertrand	4 Days 32 CLPs	April 2-5	Golden, CO Lisa Weber
Planning for Safety in Project Management CHRIS Code: 001035/0062 Dana Krupa	28 CLPs	Wednesdays 1-3pm May 29-July 3 (4 webinars, exam, eval)	Adobe Connect
Advanced Risk Management CHRIS Code: 001042 Chris Gruber	4 Days 28 CLPs	Quarter 3 TBD	Aiken, SC



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Executive Communications CHRIS Code: 001031 Shelley Simms	3 Days 24 CLPs	Quarter 3 TBD	TBD
Strategic Planning CHRIS Code: 001043 Marvin Gunn	3 Days 24 CLPs	Quarter 3 TBD	TBD
Project Risk Analysis and Management CHRIS Code: 001033 Sean Casey	3.5 Days 28 CLPs	Quarter 3 TBD	TBD
Federal Budgeting Process in DOE CHRIS Code: 001034 Alice Murphy	4 Days 32 CLPs	Quarter 3 TBD	Washington DC (EERE) Lisa Weber
Scope Management Baseline Development CHRIS Code: 001036 Sean Casey	3 Days 24 CLPs	Quarter 3 TBD	TBD
Strategic Planning CHRIS Code: 001043 Marvin Gunn	3 Days 24 CLPs	Quarter 3 TBD	SPR, New Orleans
Value Management CHRIS Code: 001037 Jeff Rude	3 Days 24 CLPs	Quarter 3 TBD	SPR, New Orleans

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Project Execution and Readiness Reviews CHRIS Code: 001039 TBD	3 Days 24 CLPs	Quarter 3 TBD	Idaho Falls, ID
Project Management Systems and Practices in DOE CHRIS Code:001024/0050 Dana Krupa	60 CLPs	Tue/Thursdays 1-3pm July 16-September 3 (11 webinars, exam, eval)	Adobe Connect
Value Management CHRIS Code: 001037 Jeff Rude	3 Days 24 CLPs	Quarter 4 TBD	TBD
Advanced Risk Management CHRIS Code: 001042 Chris Gruber	4 Days 28 CLPs	Quarter 4 TBD	Richland, WA
Performance Based Management Contracting CHRIS Code: 001951 Jerry Zimmer	3 Days 24 CLPs	Quarter 4 TBD	TBD
Federal Budgeting Process in DOE CHRIS Code: 001034 Alice Murphy	4 Days 32 CLPs	Quarter 4 TBD	SPR, New Orleans
Systems Engineering CHRIS Code: 001049 TBD	3 Days 24 CLPs	Quarter 4 TBD	TBD

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Cost and Schedule Estimate and Analysis CHRIS Code: 001044 Sean Casey	5 Days 40 CLPs	Quarter 4 TBD	Classroom
Leadership through Effective Communication CHRIS Code: 002366 Mac Bogert	3 Days 24 CLPs	Quarter 4 TBD	Washington DC (EERE)
Capital Planning for DOE O 413.3B CHRIS Code: 002152 Sean Casey	16 CLPs	Quarter 4 TBD	NA/Desktop delivery
Leadership through Effective Communication CHRIS Code: 002366 Mac Bogert	3 Days 24 CLPs	Quarter 4 TBD	SPR New Orleans
Program Management and Portfolio Analysis CHRIS Code: 001025 Larry Suda	5 Days 40 CLPs	Quarter 4 TBD	SPR New Orleans
Acquisition Management for Technical Personnel CHRIS Code: 000145 Jerry Zimmer	16 CLPs	Quarter 4 TBD	NA/Desktop delivery
Project Management Simulation CHRIS Code: 001029 Larry Suda	5 Days 40 CLPs	Quarter 4 TBD	Classroom



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The following certifications were recently issued.

Federal Project Directors

EM

- Joy Sager - Level II
- Ron Gill - Level II
- Dennis Mayton - Level I

SC

- Adam Bihary - Level III

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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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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 and 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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The screenshot shows the PM-MAX website interface. At the top, there is a navigation bar with links for '413 Resource Center', 'Reviews & Metrics', 'PARS & Earned Value Management', 'Training & Certification', 'Workshops & Awards', 'About PM', and 'ENERGY'. The main content area features a large image of the newsletter cover on the left, which includes the 'NEWS' logo and the 'U.S. DEPARTMENT OF ENERGY' logo. To the right of the image, there is a link to 'Click here to read the July 2018 Project Management Newsletter' and a section titled 'Headlines:' with a list of articles. Below the headlines, there are instructions on how to get the newsletter delivered directly to the inbox and a section for 'Newsletter Editions and Summaries' with a search filter. On the right side of the page, there is a search bar for 'Search content on PM-MAX:' and several navigation links: 'Team Collaborations', 'Browse the PM Library', 'Browse the FPD Directory', and 'Questions or Comments?'. At the bottom right, there are logos for 'esaab', 'PMRC', and 'CRB CERTIFICATION REVIEW BOARD'.

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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.

Access PMCDP on PM-MAX from anywhere: go.max.gov/doe-pm