



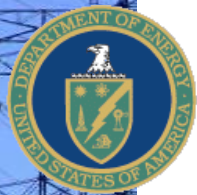
U.S. Department of Energy

Office of Electricity Delivery and Energy Reliability

Smart Grid Investment Grant (SGIG)

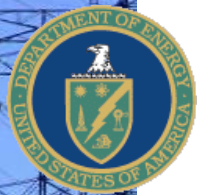
*Data Collection for Project
Management and
Performance*

*Donald Macdonald
November 19, 2009*



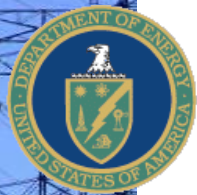
DOE's PM Approach

- **Provide DOE with project information to allow DOE to adequately monitor project progress**
- **Consistent with management of Financial Assistance projects**
- **Awardee to manage project's execution and use their standard systems while providing DOE information from your management systems**



DOE's PM Approach

- **DOE Role**
 - **Monitor performance based on awardee information**
 - **Proactively anticipate and resolve issues that impact the project's success**



Project Execution Plan

- **DOE is requesting a set of high level documents be provided at project initiation**
 - **Work Breakdown Structure (WBS)**
 - **Responsibility Assignment Matrix**
 - **Risk Management Plan**
 - **Project Cost Estimate – Lifecycle**
 - **Performance Measurement Baseline - Lifecycle**
 - **List of Major Milestones - Lifecycle**



Performance Baselines

- **Schedule Baseline**
 - **Project schedule**
 - **Major work activities associated with project**
 - **Key activities/milestones (project phase approvals, major procurements, key decisions required by other agencies, i.e. permitting)**
 - **Equivalent PM software such as Microsoft Project™ or Primavera Project™ Planner**



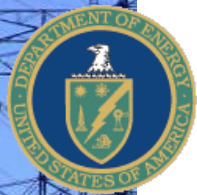
Project Value Management System (PVMS)

- **Adopts concepts and terminology of an EVMS and uses the term of Project Value Management System (PVMS)**
- **Provides cost and schedule performance metrics - reports progress against a project's baseline**
- **Allows DOE to monitor progress**



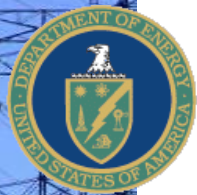
PVMS Data

- **PVMS data entered monthly on the Web-Based PM Tool**
 - **Budgeted Cost for Work Scheduled (BCWS)**
 - **Budgeted Cost for Work Performed (BCWP)**
 - **Actual Cost of Work Performed (ACWP)**
 - **Budget at Completion (BAC)**
 - **Estimate to Complete (ETC)**



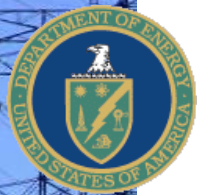
PVMS Data

- **PVMS data will be used to compute the following:**
 - **Schedule Variances (BCWP-BCWS)**
 - **Cost Variances (BCWP-ACWP)**
 - **Cost and Schedule Indices**



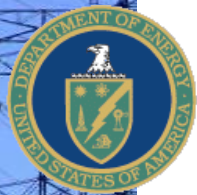
Project Reviews

- **DOE initiated project reviews (status updates)**
 - **At SGIG Project site at least annually**
 - **Teleconference**
- **SGIG Project-initiated review**



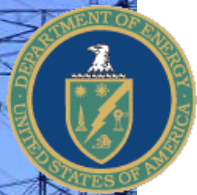
Project Reporting

- **Delivering project status and assessment information to DOE**
 - **Web-based PM Tool**
 - **Track status of SGIG projects**
 - **Track financial data**
 - **Analyze variance ratios and trends**
 - **Project Value Management System Data**
 - **Measures actual performance of work scope, cost, and schedule versus baseline**



Web-based PM Tool

- **Project data is input into website by SGIG Projects**
- **Password Protected**
- **SGIG Projects can only see their own data**
- **Allows direct input of project data and uploading of deliverables/attachments**



Web-based PM Tool Data

- **Project Information and Point of Contact**
- **Project Baselines**
- **Monthly Reporting of Project Status**
- **Project Value Management System (PVMS) Data**
- **Change Control**
- **Attachments**
- **Comments**