



**2016** Department of Energy  
Project Management Workshop  
*"Enhancing Project Management"*

# Improving DOE's Project Controls Integration with Project Management

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# Process Action Team

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- Ethan Merrill (SC)
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# Agenda

- Background
  - How did we get here?
  - What are success objectives?
  - Certification Review Board (CRB) established Process Action Team (PAT)
- Progress to date
  - CRB interface
  - Curriculum provider research
  - Develop Mission & Vision
  - Establish initial certification requirements and structure
- Path forward
  - Refine understanding of expectations, roles, & responsibilities
  - Consider existing capabilities for training, tailoring, equivalency
  - Establish & implement certification standards
  - DOE (site wide) outreach to attract desired candidates, continue maturation and involvement to achieve success criteria



# Background – Why & What?

- How did we get here?
  - DOE's initiative to improve EVMS and project management integration identified:
    - Skill gaps across the Department
    - Staffing shortfalls; difficulty in attracting qualified candidates
    - Inconsistent processes for understanding requirements, performing analysis & reporting, holding contractor responsible
- What are success objectives?
  - Consistent approach to applying project controls – analyzing data & making informed decisions across the complex
  - Expertise resides in the fields, leveraged for critical reviews, transfer knowledge across the DOE complex
  - Identify subject matter experts, provide certification levels, develop and implement training curriculum, provide opportunities for continual growth – individually and as a DOE organization



# Background (cont.)

## Certification Review Board (CRB) established Process Action Team (PAT)

- Directed to evaluate whether program, similar to PMCDP for FPDs, should be established
  - Hire contractors or “grow” federal capabilities? Depends on thresholds of complexity & cost.
  - Define the desired competency; vertical and horizontal
  - Establish curriculum, equivalencies, certification levels, & expectations
- Required quick turn-around, leverage other existing programs, reference successful organizations
  - Review PMCDP, DCMA, contractor specialist organizations, etc.
  - Decide whether we should certify personnel or not but for sure, we need to train resources to represent/protect government interests
  - Recognize existing Project Controls Professionals; provide additional mentoring/training
  - Develop a Project Controls Professional Certification Program, in some fashion, that identifies Knowledge, Skills, and Abilities (KSAs) and be able to readily identify those on the DOE “books” who are capable of being Project Controls Professionals
- Determine best method to ensure Sr. Leadership that Project Management executives have good information, communicate accurate portrayal of project, and are able to make informed decisions
  - DOE – One Voice. One Way. [Tailoring, as applicable]
  - Allows DOE leadership a level of understanding sufficient to help where/when appropriate
  - Allow Project Control Leaders on IPTs to provide advice & counsel from a PC perspective
  - Project Controls Professionals utilized to lead and/or participate on critical reviews



# Background (cont.)

## Certification Review Board (CRB) established Process Action Team (PAT)

### Summary

- Identify the “best in class” processes
- Identify the best people
- Develop training to get a cadre of personnel up to standards in a short timeframe
- Market the strategy -- attract high quality talent; utilize fully

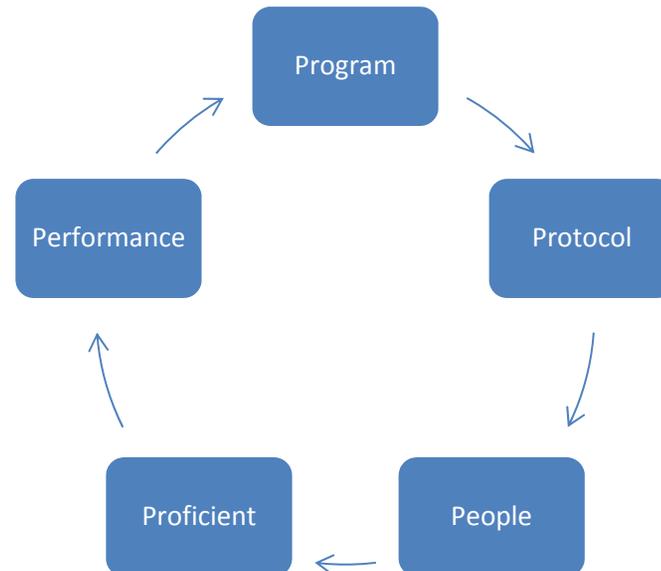
Paul Bosco – *“Through experience on several reviews, employing consistent methodology and working with HQ to identify key interests, intentionally begin efforts to transfer that knowledge to other, perhaps lower-level, key team members so that teams in the fields learn to highlight issues and concerns. This way, questions are not only being asked by HQ, but by the personnel in the field.”*

Bob Raines – *“Looking to find a group to mentor so that HQ can export Project Controls knowledge to the project teams at sites. We want to get the right skills to the right people so that they can ask the important questions.”*



# Progress to Date – Define Objective

- Propose a methodology for credentialing the Project Controls role and help identify those individuals in DOE who could serve as Project Controls Leaders assigned to support the IPT and FPD as experts, as well as team with HQ to lead and participate on EV systems surveillance and critical project reviews.





# Progress to Date – Establish Program



## Department of Energy Project Controls Fellowship Program (PCFP)

*DOE's Recognized Experts  
Making a Difference in Project Controls*



# Progress to Date – Mission Statement

Identify cadre of highly skilled Project Controls Professionals (PCPs) for a Fellowship Program that recognizes vertical depth of competency in one or more project management disciplines, by each of the Fellowship members, who strive to achieve a higher-level focus on training, mentoring, and participating on critical DOE site wide reviews to leverage KSAs to collectively increase consistency, quality, and alignment of DOE project objectives associated with performance and Earned Value Management.

\*\* Major focus is to identify potential Fellowship Candidates who profess or are readily recognizable as having a subject matter expertise in one of the desired focus areas.



# DOE Project Controls Fellowship Program

- **Solicit interest from those who profess competency, interest & commitment in a Project Controls leadership program (self-application)**
- **Candidates to complete competency assessment to determine KSAs and identify any skill gaps to be mitigated by the PCFP curriculum**
  - The assessed competencies will relate directly to the organized project phases and Critical Decisions found in the DOE Acquisition Management System
- **Certification Review Board to select Fellowship participants; limited number initially**
  - Subsequent involvement considered from self-application or recommendation from existing Fellowship members



# DOE Project Controls Fellowship Program

- **Based on competency assessment results of CRB selected candidates:**
  - The candidate will either be awarded certification at the demonstrated and approved level and enter into training for the subsequent level (if applicable), or
  - Entered into training for the Project Controls Professional entry level
- **All members expected to participate in EV systems surveillance & reviews and assume the roles and responsibilities commensurate with award of their Project Controls Professional certification level.**
  - Entry Level (1) – Team Member
  - Mid Level (2) – Discipline/Area Lead
  - Senior Level (3) – Team Lead/Review Chief



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Development Framework	Proficiency Levels	Entry/Apprentice Basic Knowledge	Mid/Journeyman Practical Application	Senior/Expert Applied Theory
Experience and Technical Skills	Experience	One Year of PM with concentration in EVM experience within the last five years	Three years of experience at the PCP entry/apprentice level	Five years of experience at the PCP mid or journeyman level
	Technical Skills	PM/EVM Fundamentals	Applying PM/EVM	Integrating/Reporting PM/EVM
Leadership & Business Acumen	Leadership Skills	Interpersonal Partnering	Integrity/Honesty Strategic Thinking	Flexibility Accountability Mentoring Political Savvy/Awareness Vision
	Business Acumen Skills	Communicate Effectively Problem Solving	Software Application Ability to influence	Stakeholder Management Negotiate
Training	Education	Bachelor’s Degree	Bachelor’s/Master’s Degrees	
	Curriculum	247 Hours/31 Days	250 Hours/31 Days	136 Hours/17 Days



# Tentative Timeline

Refine Development Framework Determine required courses; course alternatives; requirements (levels, experience, etc....) and continuous learning requirements.	April 2016
Brief PAT Recommendations to CRB	April 2016
Project Controls Reporting and Performance Standards	April 2016
Program Development - Validate program plan; courses and materials; and performance outcomes.	May 2016
Identify experts and candidates	May 2016
Pilot the Fellowship Program	June 2016



# QUESTIONS

