



DOE PROJECT MANAGEMENT NEWS

Promoting Project Management Excellence

February 2025



IN THIS ISSUE:

- Director’s Corner.....1
- Project Funding—Funding Profile vs. Spend Plan.....2
- Congrats to Our New FPDs.....2
- Enhancing Project Definition Rating Index (PDRI).....4
- JSON Transition Status Update.....5
- Project Management Lessons Learning (PMLL) Training of the Month.....6
- Earn CLPs Any Time.....6
- PMCDP Training Schedule.....7
- PM Workshop 2025 Announcement.....7
- Contact Us.....8
- Rate Your PM Newsletter Experience.....8



DIRECTOR’S CORNER

WELCOME ABOARD! A warm welcome to our incoming Secretary, the Honorable Chris Wright, as well as all members of the new DOE leadership team. I am confident they will soon realize that the department executes some of the most complex capital asset projects in all of Federal government, if not the world. And these projects are managed by some of the best Federal Project Directors (FPDs), project managers, and integrated project team (IPT) members anywhere.

The Project Definition Rating Index (PDRI) is a powerful, easy-to-use tool that identifies and describes each critical element in a scope definition package. PDRI also enables project teams to quickly identify the project risk factors related to desired outcomes for cost, schedule, and operating performance. Learn about the latest advancements, including the innovative IP2M METRR tool, and how they facilitate successful project execution and delivery in the article on page 4.

Welcome!

Financial management is a cornerstone of successful project management, ensuring that projects are completed within budget and on time. Discover how a well-structured funding profile ensures your project has the necessary financial resources at the right times, while a meticulously crafted spend plan guarantees those funds are used effectively and efficiently. Dive into the key differences and learn how mastering both can lead to successful project delivery in the article on page 2.

Registration for the 2025 DOE Project Management Workshop is now open for all attendees. Additional information can be found at [2025 Department of Energy Project Management Workshop](#). And don’t forget to check out this month’s Project Management Lessons Learned training snippet, Documenting Project Management Lessons Learned, on page 6.

Keep Charging!

Paul Bosco

PROJECT FUNDING—FUNDING PROFILE VS. SPEND PLAN

Dave Chisenhall, Office of Project Analysis (PM-20)

The performance baseline (PB), as established in the project execution plan (PEP) and approved by the project management executive (PME) at the project's critical decision (CD)-2, *Approve Performance Baseline*, defines the total project cost (TPC), at CD-4, *Approve Start of Operations or Project Completion*, date, and scope commitment to which the Department of Energy (DOE) must execute a project. This PB is based on an approved funding profile. The PB includes the entire project budget (total cost of the project that includes the performance measurement baseline, management reserve, contingency, other direct costs, and fee) and represents DOE's commitment to Congress and the Office of Management and Budget (OMB). The approved PB must be controlled, tracked and reported from the beginning to the end of a project to ensure consistency between the PEP, PME approved baseline, and, as appropriate, the project data sheet (PDS). In approving the funding profile for completing the project, PMEs must determine that the proposed funding stream is affordable and executable within the program's capital and operations budget portfolio. The funding profile is typically approved in conjunction with CD-2 approval.

Any changes to the approved funding profile that negatively impact the project after CD-2 must be endorsed by the project's PME. Prior to endorsement by the PME, the chief financial office (CFO) and the Office of Project Management (PM) will be notified of any proposed project funding profile changes so that the CFO can verify that the funding profile is covered within the President's budget.

Budget guidance directs all capital asset projects with a total estimated cost (TEC) — inclusive of design funds and funds for construction, and less than \$250M are to be fully funded in accordance with OMB Circular A-11, its associated capital programming guide, and DOE's [Financial Management Handbook | Department of Energy](#) Chapter 2.3. Programs may choose to fully fund all construction design activities for a capital asset project in one year, and then fully fund the construction activities in another year. Long-lead procurement is a useful segment only if the long-lead procurement is necessary to complete the construction design segment.



Therefore, Programs should fund long-lead procurement with construction in one year unless otherwise requested in a full funding exception request. Exception requests for projects below \$250M in TEC will be based on various criteria including, but not limited to, procurement strategy, risk avoidance, complexity, execution, and affordability. For projects greater than \$250M in TEC but with construction design, CD-3A (long-lead procurement, site preparation, etc.), and/or subprojects less than \$250M, full funding requirements will generally apply to those subcomponents. Exception requests for those subcomponents will be evaluated per the previously stated criteria.

Continued on Page 3.

CONGRATULATIONS TO OUR NEWLY CERTIFIED FPDs!



Level I

Connie Liu (EM)

Phuoc Dang (NA)

An example capital asset funding profile (\$M) could look like this at the TPC level (assumes full funding requirement exception has been approved).

In the [October 2024](#) newsletter, one of my colleagues discussed how TPC has TEC and other project costs (OPC) components. OPCs are defined as all other costs related to a project that are not included in the TEC. The above funding profile can now be shown at the component level (assumes full funding requirement exception has been approved):

Category	Prior	2025	2026	2027	2028	2029	2030	Total
OPC	2.0	1.5	1.9	0.6	0.0	0.0	1.8	7.8
TEC	11.5	30.0	19.6	1.0	34.5	50.0	9.6	156.2
TPC	13.5	31.5	21.5	1.6	34.5	50.0	11.4	164.0

The capital asset funding profile should be evaluated at the TEC and OPC component level when assessing if the profile can support the project’s planned spend, vice simply evaluating the project at the TPC level to ensure there are no shortfalls or funding gaps. Of note, it is important to understand that funding always leads spending (or said otherwise, spending lags funding). From the above example, OPC is now evaluated against the planned spend for the component:



Category	Prior	2025	2026	2027	2028	2029	2030	Total (\$M)
OPC	2.000	1.500	1.900	0.600	0.000	0.000	1.800	7.800
OPC Spend	0.243	1.040	0.863	0.556	0.489	4.536		7.727
Carryover	1.757	2.217	3.254	3.298	2.809	-1.727	0.073	

From this evaluation, a shortfall of OPC funding is identified in 2029. This must be addressed by either increasing prior funding levels or pushing planned activities into the future, which will also increase the total OPC required due to escalation impacts. TEC should be evaluated as well.

Category	Prior	2025	2026	2027	2028	2029	2030	Total (\$M)
TEC	11.5	30.0	19.6	1.0	34.5	50.0	9.6	156.2
TEC Spend	0.2	6.0	14.8	38.1	37.9	40.9	18.0	155.9
Carryover	11.3	35.3	40.1	3.0	-0.4	8.7	0.3	

Similar to the OPC example, TEC experiences a shortfall in 2028. If the spend plan was only evaluated at the TPC level, both the TEC shortfall in 2028 and OPC shortfall in 2029 are masked as indicated in the following example. This is why it is important to assess the funding profile against the planned spend at the component level.

Category	Prior	2025	2026	2027	2028	2029	2030	Total
TPC	13.5	31.5	21.5	1.6	34.5	50.0	11.4	164.0
TPC Spend	0.4	7.0	15.7	38.7	38.4	45.4	18.0	163.6
Carryover	13.1	37.5	43.4	6.3	2.4	7.0	0.4	

Fully understanding the relationship of a funding profile versus a spend plan is key to ensuring your project will have sufficient funds to execute the project in a timely manner. Ensuring you have funds authorized (i.e., funds profile) always “leads” spending these funds (i.e., spend profile).

If you have any questions about this article, the DOE budget process, or project funding profiles and spend plans, please contact your PM Project Analyst.

ENHANCING PROJECT DEFINITION RATING INDEX (PDRI)

Brian Kong, Office of Project Controls and Policy (PM-30)

The project definition rating index (PDRI) is a well-established practice used in the review and approval of project performance baselines (PB). By adopting the industry standard PDRI tools to determine whether a project is ready for baselining, the Department of Energy (DOE) documented a significant contract and project management improvement in the [2011 Root Cause Analysis Correct Action Plan closure report](#).

The implementation of PDRI was formalized in the 2010 [DOE Order 413.3B, Program and Project Management for the Acquisition of Capital Assets](#), and the 2010 [DOE Guide 413.3-12, U.S. Department of Energy Project Definition Rating Index Guide](#). Prior newsletters ([May 2017](#), [July 2017](#)) emphasized PDRI and its benefits as part of the front-end planning (FEP) process. The [April 2018](#) newsletter highlighted implementation of FEP/PDRI for PB changes, i.e., base change proposals (BCP), and continued improvements. One of these improvements, discussed in the [April 2019](#) project management newsletter, was the introduction of a new Project Management Career Development Program (PMCDP) course: [Course: Front-End Planning \(FEP\) : Getting to CD-1 | LearningNucleus](#). The September 2021 newsletter reported that the Office of Project Management (PM) staff were trained in PDRI facilitation, and the [November 2023](#) project management newsletter highlighted the updated guide [DOE Guide 413.3-12A, Front-End Planning and Project Definition Rating Index for Nuclear and Non-Nuclear Construction Projects](#). PDRI has continued to progress.

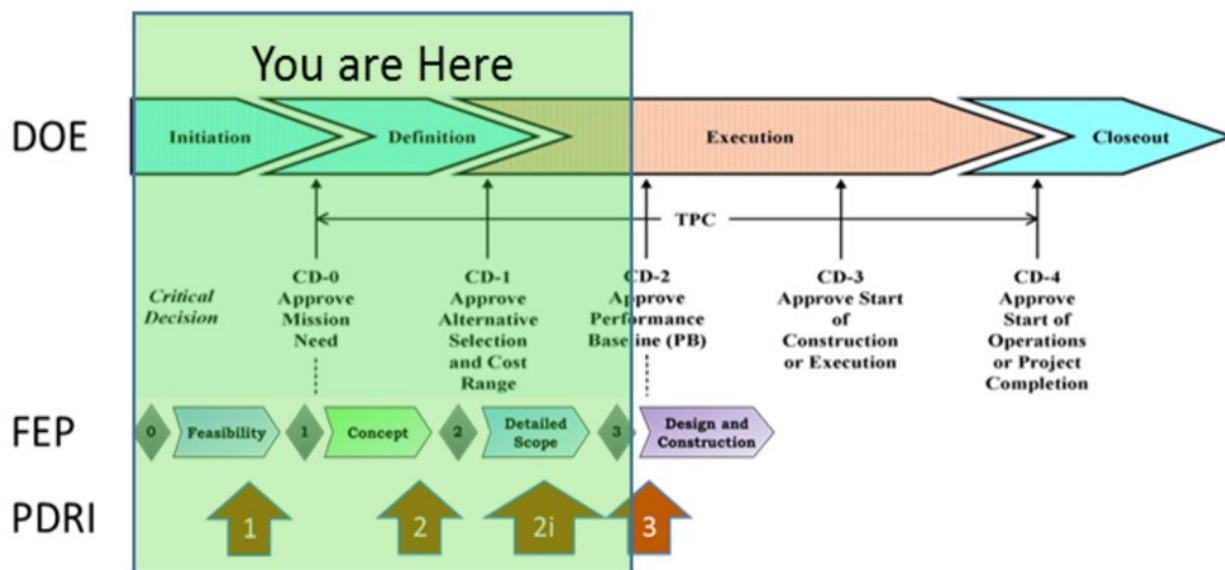
FEP is an industry [best practice](#), as identified by the Construction Industry Institute (CII). The Department is a member of CII, which provides broad research resources and identifies [PDRI training](#). Several PM staff were recently trained to become certified PDRI facilitators. [CII PDRI overview](#) illustrates its use during FEP and applicable project types.

The [PM FEP toolkit](#) aligns the use PDRI with the critical decision (CD) process, as shown below, and lists various PDRI related tools and resources.

The Department has utilized many of these tools in conducting PDRI. Continued improvement will help ensure successful project completion. Regardless of the specific PDRI tools used, PDRI should be employed throughout the FEP process, such as prior to CD-1, to ensure project definition maturation and assessment when BCPs are realized. The project scope/requirements impact not only the schedule and cost but also other elements including management, acquisition, project controls, safety, security, and quality. The integrated review of these elements using PDRI tools is critical for ensuring the project definition is understood by the project team which works as an integrated entity and is ready to address emerging issues.

PDRI extends beyond these elements as CII research has demonstrated that environmental factors (referenced as the accuracy component of PDRI) are also critical.

Figure 1. CD Process and PDRI Application Points



Continued on Page 5.

These environmental factors – culture, people, practices, and resources – may be assessed using methods identified in the [PM FEP toolkit](#), including [DOE Guide 413.3-12A](#), or the more recently implemented Integrated Project/Program Management (IP2M) Maturity and Environment Total Risk Rating (METRR) which can be used to determine whether a project is ready for baselining.

[IP2M METRR](#) is a novel assessment mechanism developed as part of a DOE-sponsored joint research study led by Arizona State University and representing more than fifteen government and industry organizations. This tool assesses a spectrum of maturity and environment issues centered around the EIA-748 guidelines. By using the IP2M METRR to assess both the maturity and environment of a project/program’s earned value management system, project leaders and personnel can understand the efficacy of their system to support integrated project/program management. It also helps identify opportunities for improvement. The goal of performing this assessment is to assure project/program participants are working with accurate, timely, and reliable information to plan and manage their work, leading to successful project/program performance. Several contractors have utilized IP2M METRR and have benefited.

The implementation and integration of the IP2M METRR environment assessment has favorably supported the PB validation process and enhanced the PDRI process. It objectively scores and analyzes the environment to identify key issues beyond the generalized PDRI maturity issues that federal and contractor project leadership can address proactively. Collectively, they help to strengthen the project definition rating.

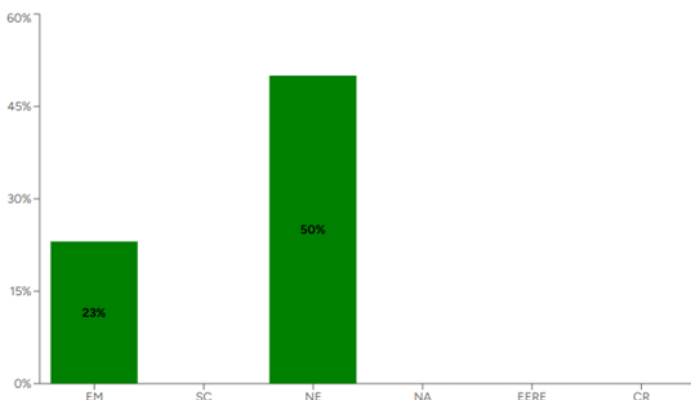
Appropriately utilized, PDRI including maturity and environment assessment, will identify the key issues that need to be addressed. For example, in preparation for PB approval, the PDRI results further support external independent review (EIR) major findings and findings. Executing the PDRI before the EIR on-site by the project and EIR teams and discussing notable differences during the on-site (similar to risk summits) then updating the PDRI is invaluable for ensuring that the project team addresses major findings and findings while mitigating project risks (including soft risks). Furthermore, the EIR teams’ PDRI enhance lines-of-inquiry (LOI) as well as the sufficiency review process and communication with the project team.

Please contact your PM-20 or PM-30 analyst, or [Brian Kong](#), if you have any questions.

JAVASCRIPT OBJECT NOTATION (JSON) TRANSITION STATUS UPDATE

As briefed at the Project Management Risk Committee (PMRC) on January 14, 2025, and further communicated in [PM-1 memo dated January 22, 2025](#), contractor project performance (CPP) uploads into the Project Assessment and Reporting System (PARS) will fully transition to JSON format by the end of calendar year 2025 and prior formats will no longer be accepted for monthly project reporting. The Office of Project Management (PM) will be communicating status to the Programs monthly, as well as providing a brief overview in this newsletter, DOE Project Management News. PM appreciates the early efforts of the Office of Environmental Management and Office of Nuclear Energy in embracing and setting the pace for transitioning to the JSON reporting schema.

Projects by Program (Green Only)



Total Projects	EM	SC	NE	NA	EERE	CR
Projects	13	28	2	24	1	2
Green Projects	3	0	1	0	0	0
Yellow Projects	4	2	0	14	1	0
Red Projects	6	20	1	10	0	2
Purple Projects	0	6	0	0	0	0

Category	Explanation
Blue	JSON Transition Complete, in PARS production.
Green	At least 3 JSON submissions with 0 Critical Errors - Ready for review to load to PARS production
Yellow	At least 1 JSON submission and fewer than 3 JSON submissions with 0 Critical Errors
Red	0 JSON Submissions
Purple	No PM Oversight

PROJECT MANAGEMENT LESSONS LEARNED (PMLL) TRAINING OF THE MONTH

PMLL Training Snippet 4: Documenting Project Management Lessons Learned

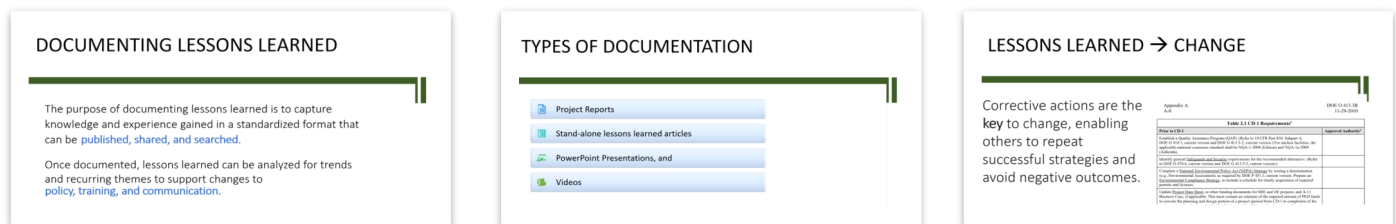
The Department of Energy (DOE) utilizes project management lessons learned in the execution of DOE capital asset projects to improve current and future projects. Lessons learned can be a good work practice or innovative approach that is captured and shared to promote repeat application, or an adverse work practice or experience that is captured and shared to prevent recurrence. Project management lessons learned are collected and shared in the Office of Environment, Health, Safety and Security Lessons Learned Database (DOE OPEXShare).

Click here to view Project Management Lessons Learned Training Snippet – [Documenting Project Management Lessons Learned](#)

Summary: This snippet provides understanding and guidance for documenting project management lessons learned.

Continuous Learning Points (CLPs): Reviewing one hour of snippets will equate to one CLP. To receive credit, FPDs can submit a CLP request under the PMCDP menu in their ESS account. All others may send an email (indicating the snippets viewed) through their respective supervisor to [DL-PM-40](#) to receive a certificate with the appropriate CLPs awarded.

Find additional Lessons Learned Training at <https://community.connect.gov/display/DOEExternal/PM+Lessons+Learned>



CONTINUOUS LEARNING POINT OPPORTUNITIES AVAILABLE ANY TIME

In addition to the Project Management Lessons Learned snippets, here are some virtual ways to keep your knowledge and skills sharp and earn continuous learning points to maintain your FPD certification.

Online PMCDP courses available through the Learning Nucleus

- [PMCDP Scheduling](#)
- [PMCDP Project Management Essentials](#)
- [PMCDP Planning for Safety in Project Management](#)
- [PMCDP Environmental Laws and Regulations](#)
- [PMCDP Earned Value Management Systems \(24/7\)](#)
- [CD-4 Project Completion and Closeout](#)

Online PARS Training – Basic and Advanced

- [PARS User Training: Basic Course](#)
- [PARS User Training: Advanced Course](#)

EVMS Snippets

- [EVMS Training Snippets](#) or
- [PM EVM Training](#)



PMCDP FY2025 TRAINING SCHEDULE— QUARTER 2

The training schedule is posted on PM-Connect. Save the direct link to the Project Management Career Development Program training schedule to your favorites: <https://community.connect.gov/x/BgZcQw>

Course Title	LN Code	Dates	CLPs	Details
Quantitative Risk Analysis	0062022	February 10-13, 2025	20	10am-3pm ET Webinar Daily
Capital Planning for DOE O 413.3B Capital Asset Projects	002152	February 18-20, 2025	16	10:30am-4:30pm ET Webinar Daily
Project Management Systems and Practices	001024	March 3-7, 2025	40	10:30am-4:30pm ET Webinar Daily
Executive Communications	001031	March 11-13, 2025	24	10:30am-4:30pm ET Webinar Daily
Federal Budgeting Process in DOE	001034	March 17-20, 2025	32	10:30am-4:30pm ET Webinar Daily
Managing Performance-Based Contracts	001951	March 25-27, 2025	24	10:30am-4:30pm ET Webinar Daily

Registration is open; click [HERE](#) to register for the Workshop.

2025 DOE Project Management Workshop

Washington DC

April 22-23, 2025*

*** Plus: Optional Project Controls Session April 24, 2025**

A limited block of rooms (Book Early!) for the PM Workshop has been reserved at the venue: Hilton Washington DC National Mall the Wharf, 480 L'Enfant Plaza SW, Washington DC.

Ctrl+Click to follow the hotel link :

[2025 DOE Project Management Workshop - Booking Link Room Reservation](#)

Additional information can be found at [2025 Department of Energy Project Management Workshop](#).

If you would like to contribute an article to the Newsletter or want to provide feedback, please contact the Editor at [DL-PM-40](#).



FIND UP-TO-DATE INFORMATION AND RESOURCES ANYTIME!

All PMCDP Course Descriptions and Course Materials can be found in the Course Catalog on



Save the direct link to your favorites: <https://community.connect.gov/x/UAT3Rw>



Or, download the Interactive Curriculum Map: <https://community.connect.gov/x/sQd1Qw>

Have a question, bug or glitch in a PMCDP online course, or want to provide feedback? Submit your questions through: PMCDPOnlineCourseSupport@hq.doe.gov.

CONTACT US!

The Office of Project Management welcomes your comments on the Department's policies related to DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*. Please report errors, omissions, ambiguities, and contradictions to: PMpolicy@hq.doe.gov.

If you have technical questions about Project Assessment and Reporting System (PARS), such as how to reset your password, please contact the PARS Help Desk at: PARS_Support@Hq.Doe.Gov. And, as always, PARS documentation, frequently asked questions (FAQs) and other helpful information can be found at [Support : PARS Support \(doe.gov\)](#). The current PARS reporting schedule is located on PM-Connect at the following link: <https://community.connect.gov/x/m4IIY>

Need information to apply for Federal Project Director (FPD) certification? The Certification and Equivalency Guidelines (CEG) can be found here: <https://community.connect.gov/x/IQd1Qw>

Can't put your finger on a document or information you were told is available on PM-Connect? Looking for information on DOE project management? Submit your questions and queries to: PMWebmaster@doe.gov.

TO REACH THE PROFESSIONAL DEVELOPMENT DIVISION (PM-40) TEAM:



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RATE YOUR EXPERIENCE WITH THE PM NEWSLETTER

Your feedback is valuable to us! Please rate your experience with this edition of the newsletter on a scale of **1 to 5** (rating of 5 stars being highly satisfied and 1 star being highly dissatisfied).



[Click here!](#)