

My Week at the Jlab EIR

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What is an EIR?

- This is the DOE Office of Construction Management's (OECM) review.
 - OECM's way of convincing themselves that the project is ready.
 - Parallel to a Lehman Review which serves a similar function for the Office of Science.
- OECM contracts out the review to LMI or Jupiter. They hire contractors who perform the review.
- Committee submits report to OECM. Typically lots of recommendations. It then becomes a negotiation with OECM to decide what they will require in order to give project a thumbs up at the ESAAB.

The Committee

- Small committee. Only 4 members plus an EVMS guy added at the last minute plus OECM rep (Brian Kong).
 - Brian Kong is very passive, nearly invisible, at the review. Very hands-off approach. The committee is free to wander in whatever direction they like, though for the most part they follow the charge.
- Most of the committee members seem to have a background in construction. Drives their thinking.
 - Absolutely no interest in technical issues. Very little interest in safety. EVMS WILL be included in NOvA review.
 - These guys are smart, experienced in Project Management, courteous, but opinionated and persistent.

The Review

- Committee really does read the material ahead of time and arrives at the review ready to go. Just a few “plenary” talks.
- Most of the sessions are like breakouts, but no more than two taking place at the same time because of the size of the committee.
- Very little involvement by L2 managers at JLab. Project Manager and Deputy ran most of the sessions and brought along the relevant project people for each breakout. Imagine more involvement from L2’s for NOvA, but it’s really a higher level review.
 - Imagine a several day management breakout at a Lehman review.

Random Observations

- Must define things very clearly. “Basis of estimate” may not mean the same thing to us as it does to them.
- They are going to have a problem with our off-project stuff.
- They think that one should take the lowest cost as the base and have an adequate contingency to cover risk. They also think that contingency should not necessarily add up linearly but should be the result of a Monte Carlo. They think 30% is large. Orthogonal to Lehman!
- They are very civil construction oriented and think that everything should work this way. What to know where they can look up costs in a cost book.
- They have a hard time with “previous experience” as the justification for a BOE unless you are doing exactly the same thing. They seem to always want a formula or a cost book.

Agenda

- Plenary overview on first morning. Just the basics.
- Breakouts with L2 managers on Civil construction, cryomodules, power systems.
- Management breakouts on:
 - Value engineering
 - Critical path*
 - Resource loaded schedule*
 - Start up test plan
 - Project office*
 - Acquisition Strategy*
 - PEP*
 - Preliminary Design Review
 - Risk management*

* I was present for these.

Critical Path

- Reviewer ran Primavera on his own machine. Files sent ahead of time. Reviewer knew the program well. Wants to manipulate the file. They do not have experience with Open Plan. Will have to work on this ahead of time.
- Walked through critical path. How was float incorporated? Interested in Critical path, 1st near critical, 2^d and 3^d. How do we see the critical paths? Important!
- Document standards and assumptions for building the schedule. How are procurements and procurement durations incorporated into the schedule? Where and how is burdening and escalation done?
 - We need a document.

Acquisition Strategy/Procurement Plan

- Need Joe Collins and Bob Cibic for this one.
- One of their charges is to make sure that the AS is consistent with the way the project is being executed.
- AS is a high level document. “Acquisition plan” is a detailed document with dates, etc. The one we have is probably OK.
- Advanced Acquisition Plan for each FY. This is a plan for all acquisitions in a given fiscal year, prepared in the previous FY. Easy for us to make one of these for FY09.
- Is there adequate staff in the Business office to work on procurements?
- Asked about small business awards and contract performance incentives – part of value engineering.

IPT

- Document for IPT charge? (We have something in PEP that probably covers this)
- What comes out of the IPT meetings?
 - We should provide agendas and minutes.
- Qualifications of people on IPT?
 - Bio of team members and Project Team. Photo plus a paragraph description.

PEP/PMP

- JLab had PEP and PMP contained in one document. Committee preferred having them separate.
- They wanted to see resource requirements in PEP/PMP.
 - Manpower curves.
 - Where does manpower come from?
- List of major procurements in PEP.

Risk Management

- Viewed as very important. “It’s where everything comes together. If you have done a good job on risk, everything else will be OK.”
- JLab’s program is similar to ours and they did well on this.
- Asked about periodic project-wide risk assessments.
 - “Do you ever get everyone together to brainstorm risks?”
- JLab had a summary of highest risks for each Level 3. Went over well.
- Very important to have an owner for each risk.
- Was there money budgeted for mitigation of risks? Should be paid for in normal budget, not through contingency. Example: Independent cost estimates for construction project were obtained to reduce risk. Cost of estimates were included in base cost.

Risk (Cont)

- Want to see the complete risk registry including low risks.
- “How is risk related to contingency analysis?”
- How do DOE programmatic risks get captured in risk analysis or contingency? (funding profile changes, continuing resolution, etc.) Brian Kong agreed that these risks should be documented. NP DOE guys did not like this.
- “Did you ever consider doing a quantitative analysis or Monte Carlo of risk analysis?”

End Game

- Closeout (outbrief) the final day of the review
- Jlab had 1 summary slide and 1-2 slides for each of the 17 LOIs.
- Jlab had a small number of “*Must Do*” items to be completed before CD-2.
- Expect draft report in ~2 weeks. After receipt of draft Jlab has 1 week for fact checking followed by the comment resolution period
- Based on the closeout, Jlab felt that they did well. There were no unexpected comments. No surprises.