

U.S. Department of Energy (DOE) Office of Project Assistance and Assurance (EM-11) Standard Operating Procedures (SOP)		
Title: EM-11 Standard Operating Procedure, SOP 013 Rev 0 June 1, 2010: Monthly Project Review/Quarterly Project Review (MPR/QPR) Meeting Preparation		
EM ORG: EM-11	SOP #: 0013	Revision #: 0
Effective Date: 06/01/10		

1. **POLICY:** The MPR/QPR meeting requirements are pursuant to EM-1 memorandum, Inés Triay, Subject: Changes to Project Reviews, dated December 5, 2008.
2. **OBJECTIVES:** The purpose of this procedure is to establish the steps required to host the MPR/QPR events.
3. **CANCELLATIONS:** This SOP does not cancel any previous SOPs.
4. **EXCLUSIONS:**
 - a. The process of generating the MPR/QPR from the Integrated Planning Accounting and Budgeting System (IPABS) shall not be covered in detail in this procedure.
 - b. The process the individual sites follow to regenerate their individual presentations and reports shall not be covered in detail in this procedure.
5. **CONTACT:**
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 - b. Eric Cochran, Office of Project Assistance and Assurance, EM-11, 301-903-7330, Eric.Cochran@em.doe.gov
6. **DEFINITIONS:**
 - a. Green Assessed Project: A project that has a Cost Performance Index (CPI) and/or Schedule Performance Index (SPI) of 0.90 – 1.10
 - b. Monthly MPR: The monthly review of Capital Asset Projects and Projects that have been assessed as Red or Yellow by EM-11 or the Office of Engineering and Construction Management (OECM), or are assessed as Green but are categorized as a High Visibility Project.
 - c. Office of Engineering and Construction Management (OECM): The office responsible for establishing Project Management and Real Property Management policy, guidance, and oversight. Other responsibilities include assessing project performance, developing and monitoring corporate performance measures for real property asset management, conducting External Independent Reviews (EIR), reviewing and certifying contractor's

- Earned Value Management Systems (EVMS), and managing the Department's Project Assessment and Reporting System (PARS).
- d. Office of Project Assistance & Assurance (EM-11): The office responsible for reporting the status of EM Capital Asset Projects. EM-11 Project Liaisons assess each Capital Asset Project monthly and meet with OEMC to discuss the assessment of each project.
 - e. Quarterly Project Review (QPR): The Review of Capital Asset and Line-Item Projects that have been assessed as Green for the last three months by EM-11 or OEMC.
 - f. Red Assessed Project: A project that has a CPI and/or SPI performance below 0.84
 - g. Yellow Assessed Project: A project that has a CPI and/or SPI performance of 0.85 – 0.89

7. PROCEDURE:

- a. All projects are assessed as either Red, Yellow or Green by OEMC according to the procedures in the EM OEMC Coordination Meeting SOP.
- b. Preparation of a draft MPR/QPR agenda begins. This includes proposing times, dates and venues for the MPR/QPR. Areas of consideration include site needs, time zones, scheduling issues, site personnel information, etc.
- c. The agenda is distributed to key individuals for review, revision and comment (EM-11 federal employees, and other contractors who have an interest or a role in the review).
- d. Any revisions or changes are made and the agenda is finalized and posted to the EM Portal by the Portal administrator.
- e. A schedule of monthly and quarterly project review dates (developed and updated by EM-11 staff) is used to determine the appropriate day for the review.
- f. An EM-11 federal employee requests and tracks reservation times and specific dates for the meeting room (5C-033) in the Forrestal headquarters building.
- g. Dial-in telephone numbers are secured by EM-11 staff from the EM operator.
- h. The final agenda and dial-in telephone number list is emailed to the Cloverleaf Video Teleconference (VTC) manager. The VTC manager ensures that video-teleconference connections are reserved in rooms at the presenting site locations.
- i. The agenda is included in a Guidance Package email to the EM complex (a master distribution list is updated monthly) along with other pertinent documentation required by the sites to develop their presentation package for review. This should be done no less than two weeks prior to the review date.
- j. The MPR/QPR Power Point reports generated from IPABS are retrieved by site personnel for further population of data as directed in the Guidance package.

- k. Site personnel complete their presentations and post the presentation to the EM-11 Portal.
- l. Presentations are retrieved from the Portal and consolidated by EM-11 contractors. The consolidated MPR/QPR presentation must adhere to the sequence of the final agenda. This final presentation shall become both the handout and the video presentation.
- m. At least ten copies of the newly generated MPR/QPR including the agenda and prior meetings action item list will be distributed by EM-11 staff to senior EM management.
- n. Approximately twenty-five copies with agendas and action item lists shall be prepared by other contractors and distributed to the Cloverleaf and Forrestal meeting rooms. This contractor also develops a Power Point slide presentation of the MPR/QPR presentation.
- o. EM-11 is responsible for hosting the MPR/QPR event and is totally accountable for its execution. Prior to the meeting the senior management calendar postings, agenda distribution, site presenters and all other details shall be reviewed and validated by the EM-11 facilitator.
- p. On the day(s) of the review the EM-11 facilitator provides any support to the contractor who runs the Power Point slide presentation.
- q. EM-11 project liaisons shall ensure action items are recorded.
- r. The action items captured from the MPR/QPR meeting shall be consolidated into one list and re-distributed to all project liaisons and senior EM management no later than 24 hours after the review.

Approved By: Lowell Ely

Signature: _____

Name and Title: Lowell Ely, Director of Project Assistance and Assurance, EM-11

Date: _____

6/30/10