1.0 purpose

This procedure describes the process for preparation, review, approval, revision, and control of the PPPL Project Management System Description (PMSD) procedures. The PPPL PMSD is described in the PPPL PMSD and the procedure listed herein (Section 5.0) and provides a consistent framework for the use of the project management systems and earned value performance measurement methods at PPPL.

2.0 REFERENCES

**2.1** DOE Order 413.3B, “Program and Project Management for the Acquisition of Capital Assets”

**2.2** PPPL Project Management System Description (PMSD)

3.0 DEFINITIONS

Abbreviations, acronyms and a glossary of terms can be found in Appendix C of the PPPL PMSD.

4.0 RESPONSIBILITIES

**4.1** The Laboratory Project Management Officer (LPMO) is the process owner of the PPPL PMSD procedures. The LPMO is responsible for the configuration management of the PPPL PMSD through the use of institutional configuration control processes. This includes revision control, coordination, review, determination and incorporation of appropriate changes, and distribution.

**4.2** PPPL project managers and project staff may submit proposed revisions of the PPPL PMSD or its related procedures to the LPMO as part of continuous quality improvement and to ensure actual practices are consistent with PMSD requirements.

**4.3** Project controls staff and control account managers (CAMS) shall advise the project manager when actual practices are different from established PMSD procedures.

5.0 Document HIErarchy

**5.1** Document Table

The PPPL PMSD consists of the procedures shown in the following table. The PMSD is the overall governing document and establishes PPPL methods for compliance with Project Management and EVMS criteria. The PPPL PMSD Procedures describe how individual elements of the System Description will be implemented in a site-wide uniform manner at PPPL.

|  |  |  |
| --- | --- | --- |
| **Document Number** | **Title** | **Document Process Owner** |
|  | PPPL Project Management System Description (PMSD) | LPMO |
| PM-1.0 | Preparation & Control of PPPL PMSD Procedures | LPMO |
| PM-1.1 | Project Plan | LPMO |
| PM-1.2 | Project Work Breakdown Structure (WBS) | LPMO |
| PM-1.3 | Project Organizational Breakdown (OBS) & Responsibility Assignment Matrix (RAM) | LPMO |
| PM-1.4 | Control Accounts and Planning Packages | LPMO |
| PM-1.5 | Work Authorization | LPMO |
| PM-1.6 | Project Schedule | LPMO |
| PM-1.7 | Cost Estimating | LPMO |
| PM-1.8 | Performance Measurement & Monthly Status/Reporting | LPMO |
| PM-1.9 | Change Control | LPMO |
| PM-1.10 | PMSD Surveillance & Maintenance | Quality Management Office |

**5.2** Individual Project Procedures

Each individual PPPL project required to meet Project Management and EVMS requirements will have a Project Execution Plan (PEP), as stipulated by DOE Order 413.3B. The project management procedures described therein, including but not limited to earned value performance measurement, shall be consistent with the provisions of the procedures described in the above table.

**5.3** Tailoring

Variations in site-wide PPPL Project Management and EVMS standard practices may be merited by special circumstances, but must be formally submitted to and by the LPMO, who will determine that the variation does not violate the 32 EVMS criteria. Approval of the tailored approach will be made in writing, and any governing stipulations recorded.

6.0 PROCEDURES

The sequential action steps involved in the development of the PMSD procedures are described below.

**6.1** Procedure Identification, Format, and Content

All PMSD procedures shall have a title block, section headings, an issue/revision date and number, and content. Procedures may also have a work flow diagram(s). The process flow diagram should list all personnel required to carry out a process and depict the steps required to complete identified tasks. The content of the procedure section shall be consistent with the information in the work flow diagram.

The Process Owner shall specify the need for project procedure development or revisions. The Head of Project Planning & Control, or designee, shall assist the Process Owner with procedure coordination. The LPMO will review and concur with the development of new PMSD-related procedures and updates to existing procedures.

PMSD procedures are identified with a document number assigned by the LPMO. The LPMO will assist each Process Owner (e.g., the Project Controls Manager, a Project Manager, a Control Account Manager (CAM), or designee) in determining the appropriate procedure identification number for the initial release of a procedure.

**6.2** Procedure Preparation and Review

The Head of Project Planning & Control shall draft or revise procedures. The LPMO, or designee, will edit and prepare the procedure for review. The Process Owner shall send the procedure draft to the LPMO, or designee, and relevant stakeholders / end users to review to ensure the procedure meets its intended purpose.

**6.3** Procedure Distribution and Implementation

Upon completion of review and resolution of any resulting comments into the procedure, the Process Owner and the LPMO will sign off a hard copy of the procedure. The LPMO will ensure distribution to all PPPL managers with Project Management responsibilities and accomplish distribution within 30 days.

**6.4** Documents and Records

LPMO, or designee, shall maintain the official signed procedures. The Process Owner shall determine implementation strategies, including the development of any training materials, necessary to educate project personnel about procedure content.

**6.5** Configuration Management of the PMSD and Related Procedures

Each procedure shall be identified with a PM procedure number, revision number, and issue date.

**6.6** Changes

Any change to the process, content, or attachments of a procedure will require a revision change. Revisions shall be identified to reviewers using appropriate markings (e.g., margin bars or “track changes” notations). For revisions of a substantial nature, all concurrence and approval signatures shall be required for release. For revisions of an administrative or minor nature (such as update to an appendix, or updating names, titles, etc.) the original concurrence and approval signatures shall be referenced by date or electronic copy of signature.

**6.7** Audits and Reviews

The LPMO shall periodically require assessments to ensure that procedures are implemented. The LPMO, or designee, shall ensure that the PMSD and related procedures be reviewed at least every three-years and released as a new revision to assure that the content is consistent with the current Project Management System processes.