

# SPOTLIGHT

SEPTEMBER 2003

## In This Issue

Welcome from the Project Manager . . . . .	1
I-MANAGE/ePME Executive Steering Committee . . . . .	2
Project Status . . . . .	3
Recent Activities . . . . .	3
Upcoming Events . . . . .	4
By the Numbers . . . . .	4
ePME Glossary . . . . .	4
Feedback Wanted . . . . .	4

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*Bringing Efficiency & Consistency to R&D Management*

*Spotlight* is the official newsletter for the DOE E-Government Corporate R&D Portfolio Management Environment (ePME) project. *Spotlight* is published quarterly for federal government employees and contractors interested in ePME activities.

## ePME Vision

Led by the Office of Science, in close partnership with the Offices of Energy Efficiency (EE), Environmental Management (EM), Fossil Energy (FE), Nuclear Energy (NE), the Chief Information Officer (CIO) and Chief Financial Officer (CFO), the E-Government Corporate R&D Portfolio Management Environment (ePME) is part of the Department's E-Government strategy in response to the President's Management Agenda. The ePME vision is to:

- Streamline and unify the Department's R&D tracking, management, and reporting processes;
- Enable portfolio management capabilities to facilitate more strategic investment decisions; and
- Implement the technology solution to support those processes in an electronic, distributed information environment.

## Welcome from the Project Manager



Kimberly Rasar,  
ePME Project Manager



Joe Malinovsky,  
ePME Deputy Project Manager

As the "dog-days" of summer come to a close, we are reminded that even though there might be a common misconception that Washington, DC, slows down in the summer, that definitely has not been the case here in the ePME Project Office. Since the last edition of the ePME *Spotlight*, new members have joined the team, the Business Process Reengineering (BPR) 1.2 has been published, Modules 1.1 and 1.2 Functional Requirements have gone through the inspection process, and

we have started forming an ePME R&D Senior Management Group.

As the ePME project continues to gain momentum, we have added new members to the team. Please join me in welcoming David Boron and Jim Fremont.

**David Boron** is a technology manager in the Industrial Technologies Program within the Energy Efficiency and Renewable Energy (EE) organization. He has corporate, non-profit, and federal project and program management experience through his work at Wheeling Pittsburgh Steel, DOE-NETL, New York State Energy Research and Development Authority, and Virginia Polytechnic Institute and State University. A chemist by training with work/management experience in the biological,



David Boron,  
Module 2 Manager

CONTINUED PAGE 2

chemical and engineering fields, David joined EE in 1991 as a program manager.



Jim Fremont,  
Communication &  
Outreach Manager

**Jim Fremont** joins us from the Office of Energy Efficiency and Renewable Energy as well. Jim is a communications specialist/writer-editor with a master's degree in journalism. He has developed communications plans, programs and materials, produced news releases, public service announcements, special events, CDs, presentations, brochures, and other outreach material for DOE and national nonprofit organizations.

### Join ePME

As the ePME project moves forward into the development phase, we are seeking other federal detailees to join us in this exciting endeavor! Below is a brief description of the positions that we're soliciting:

- The **ePME Module 1 Project Manager** position requires an individual with project management background and experience. This person would be responsible for directing and overseeing activities to successfully field this working module (see page 3 for module description).

- The **ePME Module 3 Project Manager** would also need project management background and experience. Additionally, he/she would be responsible for financial interfaces with the I-MANAGE Project.
- The **ePME Policy Manager** would be an individual who has an extensive knowledge of the DOE organizations, business and R&D processes, and policies, and has an appreciation for OMB and the interagency process. He/She would be responsible for developing and managing processes for implementing policy issues, ensuring that ePME adheres to both DOE and federal guidelines, and developing and coordinating policies consistent with applicable Congressional and OMB guidance as it impacts the R&D environment.

If you're the kind of person who enjoys being on the "fast track" and are interested in joining the ePME Team, please contact me at (202) 586-5666 or Carolyn Murphy (301) 903-2158. For a complete listing of the ePME Team, visit the ePME project web site at <http://epme.doe.gov>. We look forward to hearing from you soon.

Cheers!

Kimberly Rasar  
*ePME Project Manager*

## I-MANAGE/ePME Executive Steering Committee

As you may recall from the last newsletter, ePME and I-MANAGE decided to combine their governing bodies to create a joint I-MANAGE/ePME Executive Steering Committee. Since ePME is a program management system being developed by scientific experts for the support of scientific and technical missions, ePME will remain a separately managed project from I-MANAGE. The expanded I-MANAGE/ePME Executive Steering Committee members include:

**Ms. Karen Evans, IM (Co-Chair)**  
Chief Information Officer

**Mr. James Campbell, ME (Co-Chair)**  
Acting Chief Financial Officer

**Dr. James Decker, SC**  
Principal Deputy Director

**Mr. Robert Knipp, NE**  
Deputy Director for Operations and Management

**Mr. David Garman, EE**  
Assistant Secretary

**Mr. Michael Kane, NA**  
Deputy Associate Administrator for Management and Administration

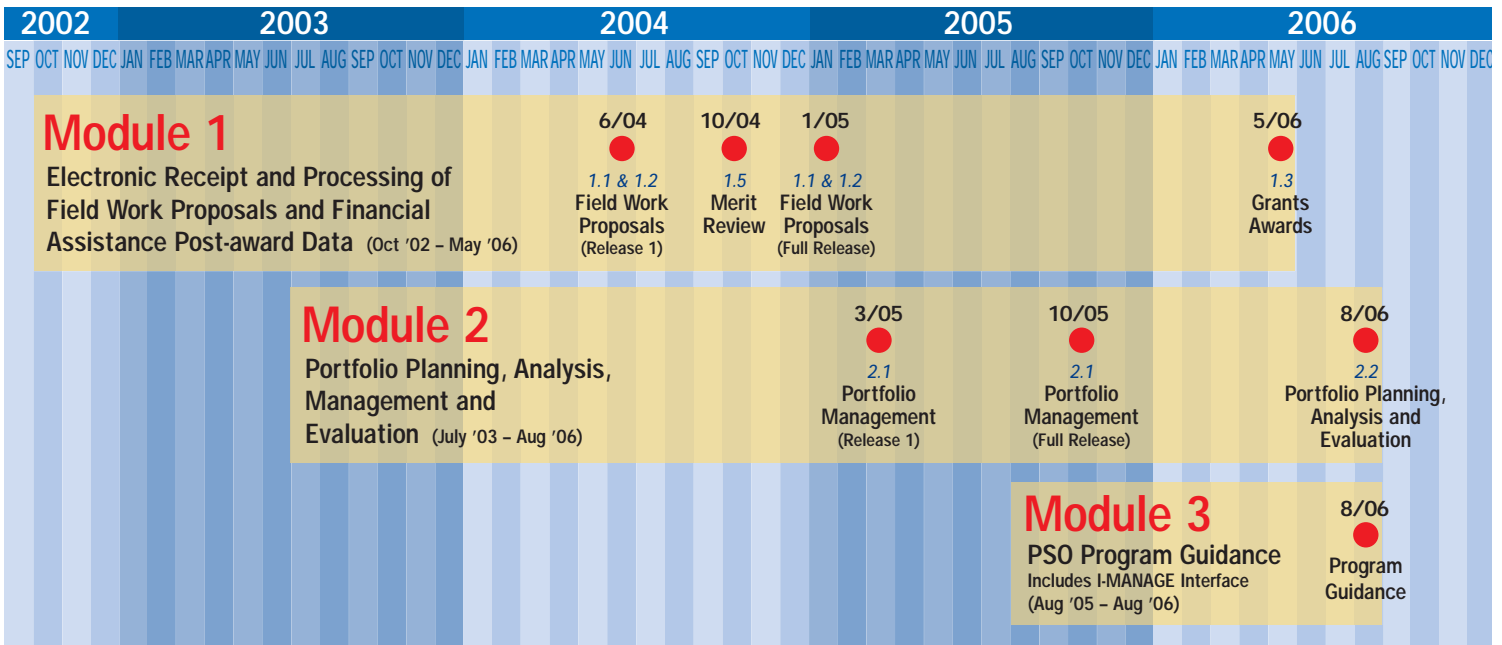
**Mr. Glenn Podonsky, OA**  
Director

**Ms. Jessie Roberson, EM**  
Assistant Secretary

The ePME Team is very excited to be working with such an esteemed group and look forward to a successful endeavor under their leadership.

# Project Status

## MAJOR PROJECT COMPONENT RELEASE DATES



- The ePME Team has recently finished compiling a resource-loaded Master Schedule that addresses all resources used to date and anticipated for the duration of the ePME project. The Master Schedule defines dates for the first release and the full release of each Module as well as major components of each Module.
- The ePME Team has been busy working on a Communication and Outreach Strategy that will dictate the outreach and communications plan for “getting the word out” about the implementation of ePME.

### Critical Policy Decisions

- In July, the ePME Project Manager held a meeting with the CIO and I-MANAGE Program Managers on the interagency efforts associated with developing a “Federal R&D PME system.” The outcome of the meeting was that the ePME Project Manager will participate in interagency efforts.
- In an official memo from Joshua B. Bolten, Director of the Office of Management and Budget (OMB), the National Science Foundation, in conjunction with OMB and the Office of Science and Technology Policy, will create a database and web site to track federally funded research and development (R&D). The Department of Energy will establish a partnership to work with NSF.

## Recent Activities

### Executive Management Support

The ePME Project Manager has held meetings with representatives from each Program Secretarial Office (PSO). The meetings were held to brief the PSO’s on Module 2 before the I-MANAGE/ePME Executive Steering Committee meeting and to discuss PSO involvement in ePME. Through this process, we have received verbal agreement to establish a R&D Senior Management Group (SMG). The primary purpose of the SMG will be to provide advice and support in the planning and implementation of the ePME Project and to prepare their respective organizations for change. Members of this Group will be comprised of senior managers from NE, EE, EM, FE, NA, OCIO, SC, and ME.

### Module 1.1 and 1.2 Requirements

The ePME team has been busy incorporating all of the information collected at the Requirements Gathering Workshops and the Validation Meeting into the Modules 1.1 and 1.2 Requirements Document. The Requirements Document has now gone through a formal document inspection process and is in the final stages of being certificated by the inspectors. The 22 participating inspectors represented 14 different organizations within the Headquarters, field office and national laboratory communities. Thank you to those of who participated in this time consuming, yet very important, activity.

## Upcoming Events

### Module 2 – Portfolio Planning, Analysis, Management and Evaluation

The ePME Team has embarked on a Business Case Analysis (BCA) with the potential to significantly modify the scope of ePME Module 2. In reviewing the concept of portfolio management, it became clear that the ePME project should investigate the possibility of supporting key functions for program planning, analysis, and evaluation (PPAE) not originally included in Module 2.

Currently, the scope of Module 2 is to provide program managers and others the tools to conduct project tracking and R&D portfolio analysis more efficiently and effectively. The addition of PPAE has the potential to change the scope and functionality of the ePME system, thus requiring the creation of a business case. Functional areas addressed by PPAE include multi-year program planning (MYPP), program performance measurement, pre-budget formulation preparation, budget defense, program analysis, lab evaluations, and the OMB program assessment rating tool (PART) and R&D Investment criteria.

On **September 25, 2003**, a major kick off meeting will be held for the Module 2 Business Case and the Business Process Reengineering which will be conducted for all of the R&D organizations within DOE. Participants will receive read-ahead materials on or about **September 18, 2003**. During the September 25 meeting, participants will receive an overview of the BCA and BPR schedules and expectation of each core team member.

Workshops are being planned this month to review and validate the PPAE “As-Is” process and to identify any opportunities for improvement, standardization, and automation.

Our current schedule plans for “To-Be” Workshops to be held in October, with the Financial Analysis Workshops being held in November. Recommendations will be finalized by mid-December 2003 and the Business Case Analysis Report will be completed and delivered to the Executive Steering Committee (ESC) in January 2004.

The ePME team plans to deliver the BCA final report by the end of January 2004 to allow the I-MANAGE/ePME Executive Steering Committee time to review the recommendations and decide on a path forward. This deadline is also being driven by the Exhibit 300 submission cycle which begins in March with the submission of new or modified Exhibit 300s. (Exhibit 300s provide detailed descriptions of current and planned IT and capital investment projects as part of an agency’s funding request.)

## By The Numbers

5 ePME ranking (out of 19) on the IDEA deployment priority

8 Number of PSOs involved in ePME\*

30 Number of other DOE organizations involved in ePME\*

215 Number of HQ, Laboratory and Field Office staff involved in ePME\*

35,000,000 Annual dollars of R&D increased efficiencies through the implementation of ePME.

1095 Number of days until ePME is fully implemented\*\*

\*As of July 2003

\*\*Based on date starting September 1, 2003

## ePME Glossary

Not sure about some ePME terms or acronyms? Coming soon on the ePME project web site (<http://epme.doe.gov>) – the ePME Glossary. The on-line glossary will help you decipher what a swim lane is and what is meant by PSPG. We encourage and look forward to your feedback on the glossary.

## Feedback Wanted!

- We want to hear from you. Help promote ePME by telling others about the project or pointing them to the project web site: <http://epme.doe.gov>.
- Suggest or submit an article for future editions of *Spotlight*.
- Tell us what you think about ePME. We need your input to successfully develop and implement this first-of-a-kind system.
- Have a question about ePME? Please send it to us.

Contact Carolyn Murphy at  
[carolyn.murphy@science.doe.gov](mailto:carolyn.murphy@science.doe.gov)