| **#** | **COMPETENCY** | **FULFILLMENT** PMCDP course, equivalent training, experience | **JUSTIFICATION**  2,000 characters max | **VERIFICATION METHOD** Course certificate, professional license, etc. |
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| **3.1** | **General Project Management** |  |  |  |
| 3.1.1 | The certification candidate must demonstrate **expert-level** knowledge of program management and portfolio analysis. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the Project Management Career Development Program (PMCDP) core course *Program Management & Portfolio Analysis*; OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training or experience requires candidates to demonstrate a majority of the following covered in the PMCDP course:   * Strategic planning and strategic goal establishment * Information gathering and analysis for multiple projects * Resource allocation between multiple (competing) projects * Project portfolio analysis |  |  |  |
| 3.1.2 | The certification candidate must demonstrate **expert-level** knowledge of Department of Energy (DOE) Order 413.3B and the Guides by providing specific project examples. A majority of the following should be addressed:   * Critical decision (CD) phases * Energy Systems Acquisition Advisory Board (ESAAB) * Project execution plans (PEPs) * Baseline change control boards * Quarterly project reviews * Independent project reviews |  |  |  |
| **3.2** | **Leadership/Team Building** |  |  |  |
| 3.2.1 | The certification candidate must demonstrate **expert-level** knowledge of Office of Management and Budget (OMB), Government Accountability Office (GAO), and Congressional processes, requirements, and relations. A majority of the following should be addressed:   * DOE’s role in championing projects to OMB and Congressional officials * Congressional, OMB and GAO inquiries * Protocols * Budget appropriation requests support * OMB and Congressional questions and answers * Congressional hearings input * Presentations to Congressional staff * The role of Congressional Affairs * Congressional, state, and local political official communications |  |  |  |
| **3.3** | **Scope Management** |  |  |  |
| 3.3.1 | The certification candidate must demonstrate **expert-level** knowledge of scope management by describing how he/she responded to a major scope challenge and how that shaped the way he/she manages projects. A majority of the following should be addressed:   * Work breakdown structure (WBS) development and implementation * Monthly contractor performance report analysis * Contract analysis and management * DOE O 413.3B scope change approval levels * Design/construction verification reviews |  |  |  |
| **3.4** | **Communication** |  |  |  |
| 3.4.1 | The certification candidate must demonstrate **expert-level** knowledge of managing external communications. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP core course *Executive Communications*; OR 2) the description of the candidate's demonstrated equivalent experience (since there is no equivalent class to *Executive Communications*, the PMCDP does not permit applicants to claim alternative training for this competency).  The justification of fulfillment through equivalent experience requires candidates to demonstrate a majority of the following covered in the PMCDP course:   * Representing DOE across agencies * Managing interaction with reporters * Understanding roles and responsibilities of the Public Affairs Office * Using public speaking techniques * Conducting new conferences/briefings/public hearings * Communicating/interfacing with external stakeholder groups * Communicating lessons-learned * Using active listening techniques |  |  |  |
| **3.5** | **Quality/Safety Management** |  |  |  |
| 3.5.1 | The certification candidate must demonstrate **expert-level** knowledge of quality/safety management by describing how he/she addressed a safety/quality management problem. All of the following should be addressed:   * Integrated safety management * DOE safety policies * DOE quality assurance orders * Inspections/testing |  |  |  |
| **3.6** | **Cost Management** |  |  |  |
| 3.6.1 | The certification candidate must demonstrate **expert-level** knowledge of cost management by describing a lesson learned on a project that helped him/her effectively manage cost. All of the following should be addressed:   * PEPs * Integrated project teams (IPTs) * Change control * Cost analysis |  |  |  |
| **3.7** | **Time Management** |  |  |  |
| 3.7.1 | The certification candidate must demonstrate **expert-level** knowledge of time management by describing the systems used for project planning and project scheduling. The following should be addressed:   * Multiple project milestone and deadline tracking * Schedule networks and critical path development * Resource allocations and impact on projects |  |  |  |
| **3.8** | **Risk Management** |  |  |  |
| 3.8.1 | The certification candidate must demonstrate **expert-level** knowledge of advanced risk management practices. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP core course *Advanced Risk Management*; OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training or experience requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * Identifying critical issues and risks * Conducting root cause analyses * Applying risk categorization principles * Using advanced techniques for project risk identification, quantification, and analysis * Using modeling tools and techniques in managing risk * Using simulations in risk analysis * Developing complex risk management plans * Applying lessons-learned from accident/incident investigations |  |  |  |
| **3.9** | **Contract Management** |  |  |  |
| 3.9.1 | The certification candidate must demonstrate **expert-level** knowledge of contract management by describing how he/she solved a contractual problem and how the experience impacted his/her contractual expertise. All of the following should be addressed:   * Contracting Officer Representative (COR) responsibilities * Contract administration procedures * Contractor deliverable evaluations * Contract change management |  |  |  |
| **3.10** | **Integration Management** |  |  |  |
| 3.10.1 | The certification candidate must demonstrate **expert-level** knowledge of integration management by describing how he/she solved a problem when trying to integrate a project and the lessons he/she learned from the experience. All of the following should be addressed:   * Project control techniques * Change control * Configuration management |  |  |  |
| 3.10.2 | The certification candidate must demonstrate **expert-level** knowledge in the areas of EVMS and project reporting. Fulfillment of this competency may be achieved through the following: 1) the successful completion of Advanced Earned Value Management Techniques; OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training or experience requires candidates to demonstrate a majority of the following knowledge topics covered in the PMCDP course:   * EVMS forms and formats for reporting timely and accurate data to customers. * The difference between schedule status and schedule performance within the EVMS, and the use of both data sources for project reporting. * The interrelationship of schedule and cost performance, and techniques for forecasting schedule and cost performance indexes. * Techniques for using Critical Path Method (CPM) and EVM data to develop schedule forecasts. * Analysis of direct and indirect rates and costs, and their application in the EV environment. * Labor rate and material price usage/efficiency variances and how to apply them in various analyses. * Techniques for developing and evaluating Estimates at Completion (EAC), and the circumstances under which to implement an Over Target Baseline (OTB) and Over Target Schedule (OTS). * The contents of a typical performance measurement report and the interpretive analysis of the report’s data. * The types of graphs and their use in analysis of EVMS performance data. * PARS II and its usage in DOE to conduct EVMS data analysis. * Formats for developing EVMS narrative reports, and an understanding of the elements that make up the Variance Analysis Report. * Knowledge of the content of the Contract Performance Report (CPR)/Integrated Program Management Report (IPMR), and how to extract data from these reports and test their accuracy. |  |  |  |
| **3.11** | **Training/Electives:** Successfully complete at least one elective from each Group, Technical & Communication |  |  |  |
| **3.11.A** | At least one from Technical |  |  |  |
| 3.11.A.1 | The certification candidate must demonstrate **expert-level** knowledge of the project execution process, including operational readiness reviews (ORRs). Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Project Execution and Readiness Reviews;* OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * The steps in the ORR process * The DOE role in the ORR process * Contractor requirements for ORRs * Safety analysis report development * Safety systems use at DOE facilities * Hazards analysis results interpretation * ORR team members selection * The orientation and training requirements for ORRs |  |  |  |
| 3.11.A.2 | The certification candidate must demonstrate **expert-level** knowledge of systems engineering. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Systems Engineering*; OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * The systems engineering process * The project requirements development process * The system architecture development * Tradeoff analyses * Life-cycle cost analyses * Systems integration * Scope of work and functional design criteria development * Functional requirements decomposition |  |  |  |
| 3.11.A.3 | The certification candidate must demonstrate **expert-level** knowledge of strategic planning processes. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Strategic Planning;* OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * Managing the strategic planning process * Establishing organizational mission and vision * Conducting situational analyses * Conducting competitive analyses * Conducting environmental scanning * Identifying strategic issues * Establishing critical success factors and core competencies * Establishing strategic goals and strategic objectives * Writing a strategic plan * Developing quantitative performance measures * Operationalizing the strategic plan * Distinguishing between mission and mandates |  |  |  |
| **3.11.B** | At least one from Communication |  |  |  |
| 3.11.B.1 | The certification candidate must demonstrate **expert-level** knowledge of labor management relations. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Labor Management Relations*; OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * The basic rights of employees and labor organizations * Union proposals, labor agreements, and negotiation tactics * Strategies for dealing with labor unions regarding working conditions * Unfair labor practice prevention * Techniques and procedures of labor contract administration |  |  |  |
| 3.11.B.2 | The certification candidate must demonstrate **expert-level** knowledge of negotiation strategies and techniques. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Negotiation Strategies and Techniques;* OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * Negotiations theory * The steps of the negotiations process * Negotiation strategy and plan development * Ethics in negotiations * Competitive negotiation and collaborative negotiation use * Strategies for negotiating cost and schedule |  |  |  |
| 3.11.B.3 | The certification candidate must demonstrate **expert-level** knowledge of conflict resolution processes. Fulfillment of this competency may be achieved through the following: 1) the successful completion of the PMCDP elective course *Facilitating Conflict Resolution;* OR 2) the successful completion of an equivalent course or training; OR 3) demonstrated equivalent experience.  The justification of fulfillment through equivalent training requires candidates to demonstrate a majority of the following knowledge examples covered in the PMCDP course:   * Recognizing potential conflict situations * Neutralizing conflict situations * Negotiating “win-win” solutions * Conducting negotiating sessions * Using interpersonal strategies to resolve/minimize conflict in groups and between employees * Resolving conflicts using facilitation techniques * Responding to conflict * Understanding communications theory and communication styles * Using active listening techniques * Using mediation to settle differences |  |  |  |
| **3.12** | Work and Developmental Activities |  |  |  |

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| 3.12.1 | Work for a minimum of two years as a Level II FPD (or equivalent) or satisfy the following equivalency (3.12.1.1). |  |  |  |
| 3.12.1.1 | Equivalency: Possess a combination of one year of Level II FPD experience (or equivalent) and one year of Deputy FPD experience. A combination of FPD and Deputy FPD experience for two continuous years on the same active, post CD-3 Level II or higher project is acceptable as long as the FPD experience accounts for a minimum of 12 months of that two-year period. |  |  |  |
| 3.12.2 | For six months, be mentored by a Level III or IV FPD who has a minimum of two years experience on a Level III or higher project, OR satisfy the following equivalencies (3.12.2.1 or 3.12.2.2).   Note: The mentoring activity must be entered into the individual development plans (IDPs) of both the mentor and mentee. A formal agreement must be signed by both parties detailing the goals, activities, etc., of the mentoring arrangement, and a signed copy of the agreement must be submitted with the certification application when it is presented to the PMCDP. |  |  |  |
| 3.12.2.1 | Equivalency: Be formally mentored for one year by a member of the Senior Executive Service (SES), or other executive excepted service positions, such as “EN,” “EJ,” “EK,” etc. |  |  |  |
| 3.12.2.2 | Equivalency: Serve as a member of the SES for two years (minimum), OR, serve for a minimum of two years in another excepted service positions as a “level four” or higher. (e.g., EN-4, EJ-4, EK-4, EK-4, etc.). |  |  |  |
| 3.12.3 | Serve one year as a COR as determined by the contracting officer (CO) or satisfy the equivalency 3.12.3.1. |  |  |  |
| 3.12.3.1 | Equivalency: Serve for two years (minimum) as a formally designated technical monitor.  Typical roles and responsibilities/activities of a technical monitor include:   * Assisting COR in interpretation of contract requirements * Questioning technical assumptions or other aspects of analyses and commenting on contract deliverables (through the COR) * Providing guidance and technical input (through the COR) related to government furnished services and items * Interacting regularly with the contractor in support of the COR * Administering technical, administrative, and/or funding aspects of a task assignment, as assigned by the COR   Both COR and technical monitor must have successfully completed the Defense Acquisition University online Contracting Officer Representativecourse CLC 222; OR, the classroom-based course *Contract Administration for Technical Representatives* provided by DOE. COR initial or refresher training must have been completed within the five years previous to the certification application date. |  |  |  |
| 3.12.4 | Candidates must demonstrate at least two years of project management experience serving as a FPD on a post CD-3 phase project; at least one year of the two years must be on a Level II or higher project. |  |  |  |
| 3.13 | **Behavioral** |  |  |  |
| 3.13.1 | **Leading change**. Certification candidates must demonstrate **expert-level** competence in leading change by describing how they persuaded a supervisor, site manager, and/or project team to try a new process to improve project management performance. |  | • Challenge/Issue:  • What I Did:  • Benefits to Project:  • Outcome/Result: |  |
| 3.13.2 | **Leading people.** Certification candidates must demonstrate **expert-level** competence in leading people by describing how they resolved a conflict among project team members. |  | • Challenge/Issue:  • What I Did:  • Benefits to Project:  • Outcome/Result: |  |
| 3.13.3 | **Producing results.** Certification candidates must demonstrate **expert-level** competence in producing results by describing how they effectively assessed project team members’ strengths and delegated duties appropriately to meet a project milestone with a tight turnaround time. |  | • Challenge/Issue: • What I Did:  • Benefits to Project:  • Outcome/Result: |  |
| 3.13.4 | **Business acumen.** Certification candidates must demonstrate **expert-level** competence in business acumen by describing innovative ways they used information management systems and other technological resources to meet their organizational needs. |  | • Challenge/Issue:  • What I Did:  • Benefits to Project:  • Outcome/Result: |  |
| 3.13.5 | **Building coalitions**. Certification candidates must demonstrate **expert-level** competence in building coalitions and communications by describing how they achieved consensus among a wide range of stakeholders with diverging interests. |  | • Challenge/Issue:  • What I Did:  • Benefits to Project:  • Outcome/Result: |  |