



Integrated Project Team Charter

Core Facility Revitalization (CFR) Project Brookhaven National Laboratory

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Prepared for:
The Department of Energy

by:
Brookhaven Science Associates

Integrated Project Team Charter

Core Facility Revitalization (CFR) Project

Recommended:



Peggy Caradonna, CFR Project Director, BSA

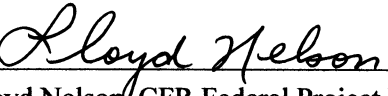
Date: 8-5-16



Steven Cannella, CFR Project Manager, BSA

Date: 8.5.16

Approved:



Lloyd Nelson, CFR Federal Project Director, DOE BHSO

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CHANGE LOG

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1.0 MISSION STATEMENT

The Integrated Project Team (IPT) provides strategic planning, expertise, coordination, and communication for the establishment of the Core Facility Revitalization Project (CFR) to ensure the project's objectives are achieved on schedule, within budget and fully capable of meeting the Department of Energy (DOE) and Brookhaven National Laboratory (BNL) mission performance standards in quality, and environment, safety and health. The IPT ensures that project management is carried out with integrity and full compliance with DOE Order 413.3B, Program and Project Management for the Acquisition of Capital Assets.

2.0 PURPOSE AND GOALS

The IPT Charter defines and integrates the roles and responsibilities of the IPT responsible for the accomplishment of the CFR Project. The Charter represents an agreement among team members on how the team will operate as an empowered partnership in making binding decisions and sharing accountability for delivering a quality, cost-effective project.

This charter embodies the three basic tenets of an IPT: the Federal Project Director (FPD) is in charge of the project; the IPT is advisory and an implementing body to the FPD; and direct communication is expected as a means of exchanging information and building trust.

This IPT charter has been prepared in accordance with the requirements of DOE O 413.3B, Program and Project Management for the Acquisition of Capital Assets.

3.0 INTEGRATED PROJECT TEAM

DOE has adopted an integrated project teaming approach as the preferred method for development, review and oversight of the acquisition process. The IPT, organized and led by the FPD, is an essential element in the management of projects from initiation through project closeout. The IPT consists of professionals representing diverse disciplines with the specific knowledge, skills and abilities to support the FPD to successfully execute the project. The IPT for the CFR Project will consist of members of both DOE and Brookhaven Science Associates (BSA). The team size, skill mix and structure will evolve over the project's life cycle to best meet the project needs.

The IPT will meet project performance parameters through frequent communication and monitoring of progress and expenditures and forecasting the future potential impacts on immediate milestones and project completion.

The IPT shall:

- Support the Federal Project Director.
- Assist with the development and implementation of a project acquisition strategy.
- Ensure all project interfaces are identified, thoroughly defined and managed to completion.

- Identify and define appropriate and adequate project technical scope, schedule and cost parameters.
- Perform periodic reviews and assessments of project performance and status against established performance parameters, baselines, milestones and deliverables.
- Plan, lead, and participate in project reviews, audits and appraisals as necessary.
- Review all Critical Decision packages for completeness and recommend approval/disapproval.
- Review and comment on project deliverables (e.g., drawings, specifications, procurement and construction packages).
- Review change requests (as appropriate) and support change control boards as requested.
- Plan and participate in operational readiness evaluations.
- Support the preparation, review and approval of project completion and closeout documentation.
- Ensure that environmental, safety, and health concerns are appropriately identified and integrated into project design and execution.
- Participate in project planning and baseline development.
- Plan and prepare project supporting documents.

3.1 Primary Team Interfaces

The CFR IPT, organized and led by the Federal Project Director, consists of the expertise and authority to effectively manage and implement the project. The key members, their roles and responsibilities, and limits of authority are defined below.

Team membership consists of members from both DOE and the contractor, BSA. The team membership will change as the project progresses from initiation to closeout to ensure the necessary skills are always represented and expertise is leveraged to meet project needs at the appropriate time.

The IPT's most critical role to assure project success is to support the FPD by accepting and performing assignments, and recognizing the IPT as their primary responsibility. The responsibility for successful project execution and authority to make tradeoff decisions rests with the IPT.

CFR Project IPT Members:

DOE Federal Project Director	Lloyd Nelson
DOE Contracting Officer	David Mitchell
DOE ES&H Representative	Chris Seniuk
CFR Project Director	Peggy Caradonna
CFR Project Manager	Steven Cannella

CFR Deputy Project Manager	Chris Ogeka
CFR Procurement Manager / Contract Administrator	Phil Gardner / Jose Velez
CFR User Representative – Director, CSI Directorate	Kerstin Kleese Van Dam
CFR User Representative – CSI Directorate, RACF Director	Eric Lancon
CFR Facility Complex Manager	Mark Davis
CFR Construction Services Manager	Steve Sawch
CFR Environment, Safety, Health and Quality Manager.	Raymond Costa

The Federal Project Director, located at the DOE Brookhaven Site Office (BHSO), will serve as the overall project team leader to support the development of strategies for acquisitions, contracts, cost estimates, evaluation of alternatives, logistics management, cost-performance tradeoffs, etc. The FPD will be the primary point of contact with the DOE Program Manager for coordination and submittal of Critical Decision documentation. The FPD will also communicate project status and discuss issues or concerns on a biweekly basis with the Program Manager in the DOE SC Office of Operations Program Management (SC-33). Input will be solicited from the Program Manager on Headquarters developments that may impact project performance.

The FPD may draw upon additional support from the BHSO and the DOE Office of Science Integrated Support Center as needed for functional areas not represented on the IPT such as budget/finance, legal and environmental support. Likewise, the BSA Project Director may draw upon similar support as needed.

It may be necessary for the FPD to interface with other DOE Headquarters organizations for Critical Decision approvals and project reviews. The Program Manager will be the IPT point of contact for interface with these organizations.

The Core Facility Revitalization Project will be executed by a Brookhaven Science Associates team that is headed by the CFR Project Director. The CFR Project Director has established a project organizational structure to accomplish this project.

Interface with BSA Management and affected personnel will be necessary for coordination of site activities that may impact project performance or where project activities may have broader impacts. The CFR Project Director will be the IPT point of contact for day-to-day interfaces with BNL Senior Management. The CFR Project Manager will be the day-to-day interface with other potentially affected and project support personnel.

The project performance teams will be responsible for implementing project elements of work. The BSA Project Manager and/or IPT team members directly associated with the elements of the work being performed shall be the primary point of contact.

Support representatives have functions in project management, project controls, field execution, safety oversight and other operations that are integral to the project.

3.2 IPT Roles, Responsibilities and Limits of Authority

Federal Project Director	<p>The DOE Federal Project Director has overall responsibility for the execution and completion of the project and chairs the IPT. The FPD provides leadership and oversight of the project and serves as the Contracting Officer's Representative (COR) to ensure the technical aspects of the project are in compliance with the terms of the contract. The FPD will provide necessary funds through financial plans, submit key project documents and critical decisions to DOE, report project progress, and assess project performance.</p> <ul style="list-style-type: none"> • Informs DOE management and stakeholders of project status and issues. • Defines project cost, schedule, performance, and scope baselines. • Reviews and approves recommendations to senior management for Level 0 and Level 1 baseline changes. • Approves Level 2 baseline change proposals within the approved change control process documented in the PEP. • Manages DOE project contingency funds. • Integrates and manages the timely delivery of Government reviews, approvals and information including PARS-II reporting. • Ensures timely completion and quality of required project documentation and other deliverables. • Approves Hazard Analysis and Conceptual Design Reports. • Leads the IPT and development of the IPT Charter, Acquisition Strategy and Project Execution Plan. • Serves as a single point of contact between Federal and contractor staff for all matters relating to the project and its performance. • Proactively identifies and ensures timely resolution of critical issues within Federal control that impact project performance.
DOE Contracting Officer	<p>The CO is responsible for ensuring that effective contracting mechanisms and administration are employed during the performance of the CFR Project. The CO has the overall responsibility for monitoring procurement activities associated with the award of the contract and contract administration.</p> <p>Provides contract-related support to the IPT, including, but not limited to, the review of project-related subcontracts submitted for DOE approval. Also recommends approval of Acquisition Strategy.</p>
DOE ES&H Representative	<p>Provides guidance and support to the FPD and the IPT in the areas of ES&H, including, but not limited to, participation in the review of project documentation (e.g., Hazard Analysis Report) and oversight of contractor activities in the area of ES&H. Coordinates additional ES&H support from within the BHSO Operations Management Division if needed.</p>
CFR Project Director	<p>The Project Director provides senior management oversight and has direct responsibility for successful execution of the project, including overall project management and ensuring that the project's objectives in terms of technical parameters, cost, and schedule are achieved in a safe and environmentally</p>

	compliant manner. The Project Director is responsible for adherence to established baselines, risk mitigation measures, project controls and integrated safety management system. Approves Level 3 baseline change proposals.
CFR Project Manager	<p>Reports to the Project Director and is responsible to direct and execute the overall project within the approved budget, schedule and scope baselines. Serves as the primary point of contact between Federal and contractor staff for day-to-day matters relating to project execution.</p> <ul style="list-style-type: none"> • Identifies and mitigates project management risks. • Prepares and provides recommendations for baseline change control proposals. • Manages and develops the project documentation for submission to the FPD. • Provides technical direction, administration and management of all subcontracts. • Participates in Management meetings and communicates the project status and issues. • Ensures ESH&Q responsibilities and requirements are integrated into the project and ensures that project activities are conducted in a safe and environmentally sound manner.
CFR Deputy Project Manager	<p>Reports to the Project Manager and is responsible to assist with direction and execution the overall project within the approved budget, schedule and scope baselines.</p> <ul style="list-style-type: none"> • Identifies and mitigates project management risks. • Prepares and provides information for baseline change control proposals. • Participates in Management meetings and communicates the project status and issues as needed. • Ensures ESH&Q responsibilities and requirements are integrated into the project and ensures that project activities are conducted in a safe and environmentally sound manner.
CFR Procurement Manager / Contract Manager	Provides subcontract administration and contractual support; solicits sources and administers subcontracts. Performs price and cost analysis and directs preparation of the Request for Proposal. Ensures all contractual provisions are approved and met; negotiates terms, recommends award and prepares necessary justification documentation. Prepares subcontract modification changes in scope of work, funding and schedules. Recommends resolution of disputes and subcontractor claims. Upon completion, performs subcontract closeout.
CFR User Representatives	The points of contact from the science division that will occupy the new facility and provide scientific and user input into the project. Provide technical guidance on the programming requirements for the project and will serve as technical advisors through project completion. The representatives will interface with the A/E during programming and design reviews.
CFR Construction Services Manager	Provides oversight of construction activities to ensure compliance with contractual documents and ES&H requirements. Responsible for executing the facility construction within the approved budget and schedule.
CFR ESH&Q Manager	Responsible for developing and implementing the ESH&Q program to ensure the project is designed, constructed and operated in accordance with BSA and

	DOE requirements to protect workers and the environment. Approves the construction subcontractor hazard assessment and safety plans.
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3.3 Team Operating Concepts

The importance of building effective organizational relationships is a critical facet in achieving goals. The FPD shall foster an environment that promotes teamwork and collaboration, involving both individuals and groups in the decision making process where possible. This approach promotes a sense of ownership and commitments with the particular issue. The FPD guides the IPT towards consensus decision making.

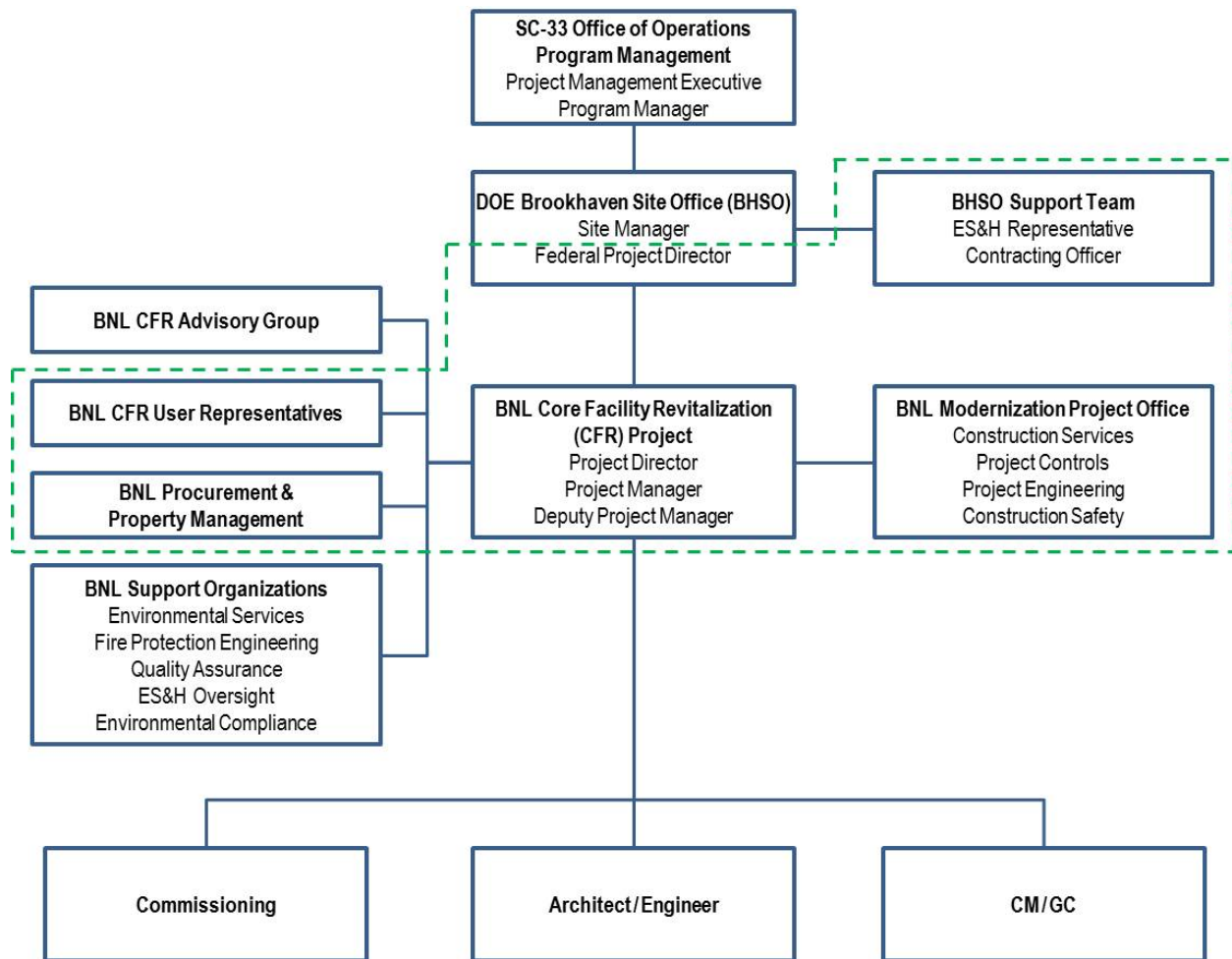
The Team objective is to achieve agreement and resolve issues rapidly at the lowest possible level at which resolution can be reasonably expected, without hindering project progress.

3.4 Meetings

The IPT shall participate in meetings as often as necessary to support the Federal Project Director. Meetings will be scheduled in association with project milestones and/or the resolution of action items from a prior meeting. Team members shall meet with each other and with external interfaces as necessary to resolve specific issues.

3.5 Integrated Project Team Life

The Integrated Project Team charter shall expire when CD-4 Project Closeout has been approved by the Acquisition Executive. This charter is a living document and the IPT membership may change during the life of the project. The FPD will issue revisions to the charter as necessary



----- IPT is identified by dashed lines