

**Office of Science**

# **Oak Ridge Office**

**Fiscal Year 2008  
Annual Performance Plan**



**September 2007**

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## Preface

The Oak Ridge Office (ORO) is a diverse Department of Energy (DOE) office with key missions in Science and Technology, Environmental Management, Science Education, Energy and Nuclear Fuel Supply, National Security, and Technology and Economic Development. Primary Departmental facilities for which ORO is responsible include the Oak Ridge National Laboratory (ORNL), the Oak Ridge Institute for Science and Education (ORISE), and the East Tennessee Technology Park (ETTP). ORO also manages the Oak Ridge Reservation to assure that programs and initiatives conducted on the Reservation are effective, efficient and are performed in a safe and environmentally sound manner.

The ORO Annual Performance Plan (APP) is an essential element of ORO's integrated management approach for performance and accountability and is also necessary to achieve key mission activities for Fiscal Year (FY) 2008. The purpose of the ORO APP is to implement DOE's Strategic Themes by;

- Establishing clear performance goals, objectives and measures
- Communicating organizational goals and expectations to employees
- Providing linkages to individual performance plans
- Communicating organizational planning priorities to DOE Headquarters (HQ)
- Creating a basis for strengthening and evaluating performance
- Conducting self-assessments and achieving continuous improvement
- Creating the basis for the Annual Assessment Report (AAR)

The performance elements of this plan address the goals and objectives of:

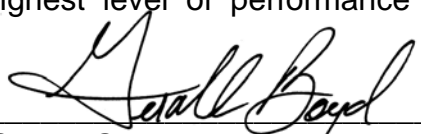
- The Office of Science (SC) Strategic Plan
- The SC Chief Operating Officer (COO)
- The Integrated Service Center (ISC) and OneSC
- The DOE Strategic Plan
- The DOE's Management Challenges
- The President's Management Agenda
- The ORO Federal Management and Infrastructure

Specific measures showing ORO support to achieve these strategic themes, goals, and objectives are provided so that ORO's performance can be both demonstrated and measured. ORO will use this APP to effectively manage ORO performance and to continuously improve our planning for both ongoing and future work.

The ORO APP is designed to achieve the highest level of performance in the accomplishment of our mission and duties.

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September 4, 2007



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Gerald G. Boyd, Manager  
Oak Ridge Office

## **1.0 Office Mission**

The Oak Ridge Office (ORO) is a diverse DOE office with key missions in Science and Technology, Environmental Management, Science Education, Energy and Nuclear Fuel Supply, National Security, and Technology and Economic Development. ORO is located in Oak Ridge, Tennessee, and is responsible for the Oak Ridge Reservation (33,718 acres of land). Primary Departmental facilities for which ORO is responsible include the Oak Ridge National Laboratory, the Oak Ridge Institute for Science and Education, and the East Tennessee Technology Park. Major contractors include UT-Battelle, LLC; Oak Ridge Associated Universities; Bechtel Jacobs Company LLC; Foster Wheeler/EnergX; Isotek LLC; and Wackenhut Services, Inc. In addition, ORO has a unique relationship with the United States Enrichment Corporation (USEC) through a lease arrangement.

ORO is a critical element of the Office of Science (SC) program execution and implementation capability. The ORO Manager is the focal point of management for all non-National Nuclear Security Administration (NNSA) activities performed on the Oak Ridge Reservation and serves as the Lead Federal Manager for all reservation events that have the potential for impact to multiple sites or the public.

The primary SC mission assigned to Oak Ridge is to successfully manage the DOE performance-based management and operating (M&O) contract for the safe, secure, effective, and efficient operation of the ORNL. In this role, ORO supports the SC mission to foster, formulate, and support forefront basic and applied research programs which advance the science and technology foundations necessary to accomplish DOE missions. ORO has an additional role to provide business, technical, and administrative support to the SC complex as a partner in the SC Integrated Service Center (ISC). This support is provided to SC Laboratory Site Offices, elements of SC at HQ, and as appropriate, other Federal agencies. ORO also provides support to the NNSA Y-12 Site Office and other DOE offices.

ORO manages the work of the Office of Environmental Management (EM) and the Office of Nuclear Energy (NE), Science, and Technology and executes program activities through Oak Ridge based agreements with those offices. In this regard, ORO also has a primary mission to manage the Oak Ridge Reservation and assure that programs and initiatives conducted on the Reservation are effective and efficient and that safety hazards are minimized to the greatest extent possible. ORO manages assigned DOE Centers of Excellence in addition to serving as the payments processing center for the entire DOE complex.

The complete ORO Mission Statement can be found at the following website:

[http://www.screstruct.doe.gov/implementation/pdfs/OR\\_1-06-2005.pdf](http://www.screstruct.doe.gov/implementation/pdfs/OR_1-06-2005.pdf)

## **2.0 Strategic Themes/Goals/Objectives/Measures**

With the issuance of the SC FY 2008 Annual Planning Guidance memo, dated July 17, 2007, ORO determined it was necessary to restructure the ORO Annual Performance Plan (APP) to include the SC Chief Operating Officer (COO) goals and objectives. However, it is equally important that the ORO APP also continue to focus on the DOE Strategic Plan, the SC Strategic Plan, and the President's Management Agenda. The ORO APP must be an overarching plan that is integrated and links to these important documents and be consistent with the ORO management approach outlined in its Management System Description (MSD). The MSD is the comprehensive high-level description of ORO's Management System and includes the supporting documents describing the Science and Environmental activities occurring in Oak Ridge.

Each year, ORO develops the APP as a top-level plan for defining ORO's goals and objectives and for tracking ORO's progress and performance in meeting these established goals and objectives which support the DOE Strategic Plan, the SC Strategic Plan and the President's Management Agenda; and this year it will also support the SC-COO goals and objectives. The APP ties to the DOE Strategic Plan, the SC Strategic Plan and the President's Management Agenda via Strategic Themes and Goals by providing specific measures showing ORO support to achieve these themes and goals. The ORO APP, as in past years, also contains a section on ORO Federal Management and Infrastructure which is specific to ORO and not contained in the other higher-level measures. The APP is supported by organizational and program plans.

The specific measures and associated target dates in the ORO APP are identified with a point of contact to support achievement of the objectives and goals. When identifying the measures and target dates, other documents such as the OneSC Project Plan, the Environmental Management Project Execution Plan, contractor performance evaluation plans, the Project Analysis and Reporting System (PARS), and the ORO Assurance Memorandum are considered in order to capture other important goals and objectives.

Performance plans for Senior Executives, Managers, and other employees, cascade from these important documents. Thus, accomplishments in support of the DOE Strategic Plan, the SC Strategic Plan, the President's Management Agenda, and the APP can be tracked.

On a monthly basis, led by the ORO Manager, the APP is reviewed and status documented by ORO senior management. The "red/yellow/green" system is employed for a visual assessment of progress towards accomplishing each measure. Areas of concern and issues are addressed as part of the ORO continuous improvement program. The September monthly review serves as a primary input to the ORO Annual Assessment Report (AAR).

The FY 2008 goals, objectives and measures are contained in Attachment 1 to this APP.

### **3.0 Resource Requirements**

The requested FY 2008 budget for the ORO is \$1.625B. As noted above, Oak Ridge is a large multi-program site and receives funding from many DOE programs, including Science, Nuclear Non-Proliferation, Environmental Management, Nuclear Energy, and Energy Efficiency. In addition to DOE funding, Oak Ridge expects to receive approximately \$375M in FY 2008 from other Federal Agencies, bringing the total ORO budget to \$2B.

The expected FY 2008 Program Direction budget is \$66.2M, of which \$44.15M is from Science. The major expense categories are salary and benefits, office space, training, travel, support services and other related services. In continuing to fulfill our roles and responsibilities associated with the SC Integrated Support Center, ORO is experiencing an increase in requests to support various SC Site Offices which presents some challenges related to staffing resources and travel funds.

All ORO employees are located in government-owned facilities with the majority of the workforce housed in the Federal Building. Organizations having oversight for certain contractors are located at the Oak Ridge National Laboratory. There are no major facility or infrastructure issues that need to be addressed to accommodate the Federal staff.

### **4.0 Human Capital**

At the end of FY 2008, ORO's overall staffing level is projected to be at approximately 400 FTEs of which approximately 285 FTEs are for SC. ORO plans to hold overall staffing relatively level in FY 2008 contingent upon expected budget levels. Based on the current scope of SC, EM and other program work in Oak Ridge, staffing levels will need to remain relatively constant in FY 2008 to successfully achieve the ORO mission.

The anticipated loss of critical skills because of retirements continues to be a significant concern and risk to ORO meeting its mission. While this issue is being managed, ORO recognizes that this remains a vulnerability, particularly if those retirement-eligible employees leave en masse. Over the next 4 years (by the end of FY 2011), ORO will have 166 employees (43 percent) eligible for optional/discretionary retirement and an additional 121 employees (31 percent) eligible for early retirement. For certain critical positions, the numbers are even more serious. For example, over the next 4 years, 58 percent of Federal Project Directors (FPDs) will be eligible for optional/discretionary retirement, and 33 percent will be eligible for early retirement. For Senior Technical Safety Managers (STSMs), the respective numbers are 48 percent and 33 percent. In FY 2008, 50 percent of the FPDs and 33 percent of the STSMs will be eligible for optional retirement.

#### **4.0 Human Capital (Continued)**

Succession planning will continue to be increasingly important as ORO makes adjustments to meet future needs and hires new employees as retirements occur. ORO will also focus on the diversity of the organization and capitalize on opportunities to improve our underrepresented areas.

Having a properly trained workforce is essential to accomplishing our mission and to offset the anticipated loss of critical skills. ORO has set a high priority on ensuring that the 40 percent of employees in the Technical Qualification Program receive the necessary specialized training to receive and maintain their certifications. The same level of attention will be paid to certifying Federal Project Directors and Facility Representatives.

#### **5.0 Integrated Assessment Schedule/Plan**

The assessment schedules for ORO are contained in the Oak Ridge automated assessment tracking system ORION. ORION is designed to be the safety management system for ORO and tracks assessments, reports, corrective action plans, issues, actions, walkthroughs, and lessons learned. Each ORO organization developed their individual assessment schedules in accordance with this year's Annual APP Guidance memo. Attachment 4 to this APP provides a link and direction on how to access ORION along with directions on how to run an SC Integrated Assessment Schedule (IAS) Report. Attachment 4 also contains a snapshot copy of the SC IAS as of August 31, 2007.

ORO utilizes a Risk-Based Approach to Oversight and Development of the ORO SC Integrated Assessment Schedule (IAS). ORO uses its risk-based approach in performing oversight of the contractor and ORO federal programs, management systems, and implementation of ORO and contractor assurance systems. ORO's oversight process includes formal independent and management assessments, operational awareness and walkthrough activities, drills and exercises, and use of operational and performance trending and analysis to identify adverse trends and focus areas for oversight. ORO's previous and future assessment planning incorporates internal and external assessments and daily operational awareness to provide management with both line and independent perspectives on effectiveness of the contractor and federal assurance systems. For higher-risk ORO facilities and activities, ORO provides increased oversight, such as dedicated Facility Representatives, daily interactions with the contractor, evaluation of safety systems, readiness reviews, and ongoing communications with DOE Headquarters, the Central Technical Authorities, regulators, and the public. In addition, ORO receives an independent perspective from DOE HQ Independent Oversight assessments.

## **5.0 Integrated Assessment Schedule/Plan (Continued)**

ORO follows a highly structured approach in development of oversight plans and the IAS. The SC IAS presented by Oak Ridge is formulated on the basic premise of “high-threshold” and “risk-based” considerations. In order to create a viable and comprehensive set of assessments, ORO assembled a Three-Year Plan Team, with an experienced assessment planning representative from each major organizational element. The Three-Year Plan Team reviewed DOE and regulatory drivers for performing assessments, reviewed results of past DOE and contractor oversight activities and operational performance, evaluated areas of vulnerability and greater risk based on previous contractor and DOE assessments, and worked with ORO managers to develop a comprehensive assessment plan and schedule for ORO. Each organization, as well as the Manager’s Office, used a myriad of data and informational considerations as tools to formulate their assessment schedules. One such tool entailed a statistical/trend evaluation of operational performance reflected in occurrence reports, near miss incidents and findings from OR internal and external assessments, reviews, and assist visits. This tool offered a more quantitative analysis based on empirical operational experience type data. Dominant facilities, including nuclear, were considered in the formulation of the IAS, again, based on a variety of relevant risk factors such as: facility physical condition, material and form, isotopic/chemical inventories, other hazards, current/planned mission/operation, frequency of general oversight (e.g., Facility Representatives, Systems Engineers, Subject Matter Experts, etc.) and features of engineered/administrative controls. Similarly, factors such as programmatic needs, general contractor performance and any predominant contractor issues/concerns are considered. Individually, as well as collectively, organizational elements employed both quantitative and qualitative information to consider, evaluate, and finally determine high-threshold, risk-based components of the SC Three-Year IAS.



**Attachment 1**

**Oak Ridge Office**

**Strategic Themes/Goals/Objectives/Measures**

## Oak Ridge Office Annual Performance Plan

**FY 2008**

Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
<b>SC COO Performance Goals</b>										
<b>Improve our Operation</b>	Complete development and implementation of SCMS	<ul style="list-style-type: none"> <li>Review AMS internal procedures and processes for consistency with finalized SCMS procedures</li> </ul>	6 mos. after SC/HQ issuance				Moore			1
		<ul style="list-style-type: none"> <li>All Management Systems Description (MSD) approved and published</li> </ul>	12/31/07				Wilken/Vosburg			2
		<ul style="list-style-type: none"> <li>Management System Owners (MSO) submit all respective subject areas and procedures to the SCMS Operations Center</li> </ul>	12/31/07				Wilken/Vosburg			3
		<ul style="list-style-type: none"> <li>SCMS Ops Center complete technical editing on all subject areas/procedures and disburse for final review</li> </ul>	3/31/08				Wilken/Vosburg			4
		<ul style="list-style-type: none"> <li>Develop and publish online SCMS user guide</li> </ul>	3/31/08				Wilken/Vosburg			5
		<ul style="list-style-type: none"> <li>SCMS operational across the COO organization</li> </ul>	6/30/08				Wilken/Vosburg			6
		<ul style="list-style-type: none"> <li>Initiate SC employee training for SCMS</li> </ul>	3/31/08				Wilken/Vosburg			7
		<ul style="list-style-type: none"> <li>Publish all subject areas/procedures within SCMS</li> </ul>	6/30/08				Wilken/Vosburg			8
		<ul style="list-style-type: none"> <li>Ensure appropriate AMESH procedures and protocols are integrated and aligned with final SCMS</li> </ul>	6 mos. after SC/HQ issuance				Kelly/Smyth			9
		<ul style="list-style-type: none"> <li>Complete re-engineering of all CFO processes in SCMS</li> </ul>	12/31/07				Perry/Hackett			10

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.	
				O C T	N O V	D E C					
	Complete/update staffing analyses	• Provide support to HQ in these activities	09/30/08				Moore			11	
		• Implement common process under OneSC	11/30/07				Wilken/ Howse-Smith			12	
		• Support site offices and HQ in workforce staffing and planning efforts	11/30/07				Wilken/ Howse-Smith			13	
	Improve COO budget processes	• Provide support to HQ in these activities	09/30/08				Moore			14	
	Meet SCMS QA and Oversight Management System requirements	• Transmit FY 2008 Annual Performance Plan to SC-3	8/30/08				Boggs				15
		• Define SC expectations, including those related to effectiveness and utility for Integrated Assessment Schedule (IAS) with input from SC organizations and publish within SCMS	12/31/08				Wilken/ Vosburg				16
		• Conduct line assessments and those in support of HQ/Site Offices as defined in the IAS	As scheduled				Wilken/ Vosburg				17
		• Support update/development of SC Line Management/QA Program Descriptions and publish within SCMS	3/31/08				Wilken/ Vosburg				18
		• Develop/communicate measures to assess SCMS implementation	12/31/08				Wilken/ Vosburg				19
		• Support S-3 in an assessment of SCMS implementation	9/30/08				Wilken/ Vosburg				20
• Conduct annual Management/Self-Assessments in accordance with SCMS		9/30/08				Wilken/ Vosburg				21	

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Ensure ORO directives, manuals, and OR system descriptions related to QA and Oversight are consistent with the final SCMS in these areas</li> </ul>	6 mos. after SC/HQ issuance				Kelly/Smyth			22
	Clearly define roles of HQ organizational elements	Provide support to HQ in these activities	09/30/08				Moore			23
	Improve Nuclear Operations	<ul style="list-style-type: none"> <li>Establish routine communications with other SC nuclear sites and factor in improvements where appropriate</li> </ul>	12/31/07				Moore			24
	Improve Financial Operations	<ul style="list-style-type: none"> <li>Consolidate OSTI allotment with Oak Ridge allotment</li> </ul>	9/30/08				Penry/Hackett/Fitchpatrick/Payne			25
	Fully implement SC Technical Qualification Program	<ul style="list-style-type: none"> <li>Develop/publish SC Technical Qualification Program (TQP) implementation guidance/procedures in SCMS</li> </ul>	1/31/08				Wilken/Vosburg			26
		<ul style="list-style-type: none"> <li>Identify/notify participants of their inclusion in the TQP</li> </ul>	1/31/08				Wilken/Vosburg			27
		<ul style="list-style-type: none"> <li>Establish TQP support mechanisms to assist SC Managers in implementation for their respective organizations</li> </ul>	3/31/08				Wilken/Vosburg			28
		<ul style="list-style-type: none"> <li>Develop/communicate specific qualifications standards for employees subject to SC TQP</li> </ul>	3/31/08				Wilken/Vosburg			29
		<ul style="list-style-type: none"> <li>Identify /document functional competencies for all participants</li> </ul>	6/30/08				Wilken/Vosburg			30
		<ul style="list-style-type: none"> <li>TQP fully established across SC in terms of necessary documentation, procedures and support mechanisms</li> </ul>	6/30/08				Wilken/Vosburg			31

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Continue full implementation and ensure ORO's program meets or exceeds SCMS in this area</li> </ul>	9/30/08				Kelly/Smyth			32
<b>Improve our Laboratories</b>	Invest in Laboratory Infrastructure	<ul style="list-style-type: none"> <li>Facilitate the success of the Strategic Laboratory Initiatives</li> </ul>	9/30/08				Moore		Cross reference to Item No. 176 (Modernization of Laboratory Facilities)	33
		<ul style="list-style-type: none"> <li>Monitor the Cyber Security Program at the Labs per Program Cyber Security Plan</li> </ul>	Ongoing				Wilken/Price			34
	Understand and control the cost of doing business	<ul style="list-style-type: none"> <li>Baseline each site</li> </ul>	07/30/08				Moore		Monitored via PEMP	35
		<ul style="list-style-type: none"> <li>Develop baseline of common site indirect components</li> </ul>	11/30/07				Penry/Fitchpatrick			36
		<ul style="list-style-type: none"> <li>Establish cost growth or reduction targets and manage to established levels</li> </ul>	01/31/08				Penry/Fitchpatrick			37
		<ul style="list-style-type: none"> <li>Plan long-term strategies to reduce overall costs</li> </ul>	09/30/08				Moore		Monitored via PEMP	38
	Make a difference: Target areas in need based on '07 appraisal	<ul style="list-style-type: none"> <li>Emphasize those areas needing improvement into the FY 2008 Appraisal process</li> </ul>	11/30/07				Moore			39
	Improve HR practices and systems	<ul style="list-style-type: none"> <li>Complete comparison study of Compensation Programs of SC Labs supported by ORO</li> </ul>	7/30/08				Wilken/Howse-Smith			40
<ul style="list-style-type: none"> <li>Identify and make recommendations on opportunities for consistency in compensation programs</li> </ul>		8/30/08				Wilken/Howse-Smith			41	
<b>Bring Order to Chaos</b>	Manage to right requirements: Support the Secretarial initiative on improving the management of DOE directives	Provide support to HQ in these activities	9/30/08				Moore			42

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
<b>Help Our Laboratories be Successful</b>	Review DOE operations for efficiencies and value added	<ul style="list-style-type: none"> <li>Complete planned FY 2007 AMS self-assessment activities and incorporate identified improvements</li> </ul>	10/31/07				Moore			43
	Better understand and impact contractor safety performance	<ul style="list-style-type: none"> <li>Meet the .65 goal for Total Recordable Cases (TRC) for ORNL</li> </ul>	9/30/08				Moore			44
		<ul style="list-style-type: none"> <li>Meet the .25 goal for Days Away, Restricted, or Transferred (DART) for ORNL</li> </ul>	9/30/08				Moore			45
	Support the goals of E.O. 13432, Strengthening Federal Environmental, Energy, and Transportation Management and the Secretarial Transformational Energy Action Management (TEAM) Initiative	<ul style="list-style-type: none"> <li>Support ORNL in achieving their goals in FY 2008</li> </ul>	9/30/08				Moore		Cross reference with Item Nos. 79 and 53 (Goal 1.4 Measure)	46
		<ul style="list-style-type: none"> <li>Reinforce energy efficiency processes, activities, and benefits with AMS staff</li> </ul>	9/30/08				Moore			47
<b>Evaluate our Contractors Fairly</b>	Measure the right things	Further define and refine the elements of PEMP Goal 4, Sound and Competent Leadership and Stewardship of the Laboratory for FY 2009	8/30/08				Moore			48
		Develop a consistent approach to safety expectations in PEMP Goal 5, Integrated Safety, Health and Environmental Protection for FY 2009	8/30/08				Moore			49
		Develop a consistent approach to the components of PEMP Goal 6.3, Human Resource Management System for FY 2009	8/30/08				Moore			50

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
		Develop consistent measures in PEMP Goal 7, Sustain Excellence in Operating, Maintaining, and Renewing the Facility and Infrastructure Portfolio to Meet Laboratory Needs for:	8/30/08				Moore			51
		▶ Following the Institutional GPP challenge	8/30/08				Moore			52
		▶ Reducing the cost of doing business	8/30/08				Moore			53
		▶ Holding contractors accountable for meeting E.O. 13432 goals	8/30/08				Moore		Cross reference with Item Nos. 79 and 45 (Goal 1.4 Measure)	54
		● Complete Performance Evaluation Report for Wackenhut Services, Inc.	TBD				Douglas			55
	Set expectations at the right level	● Define and run a more rigorous normalization process with both the Site Office Managers and Associate Directors	1/31/08				Moore			56
	Drive consistency in the evaluation process	● Define and run a more rigorous year-end evaluation process with Site Office Managers and Associate Directors	1/31/08				Moore			57

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
<b>Integrated Service Center / OneSC Project</b>										
Provide the necessary resources (right people with right competencies) to ensure effective Federal oversight in the accomplishment of DOE missions.	Support OneSC	As requested, provide ES&H support to OneSC efforts	Ongoing				Kelly			58
		• Provide financial support to site offices in accordance with OneSC strategy	Ongoing				Penry			59
		• Develop three-year assessment plan for FY 2009-2011	9/30/08				Penry/ Payne			60
		• Prepare analysis and report on results of FY 2008 financial management assessments in response to Office of Science	12/31/08				Penry/ Payne			61
	Successfully perform M&O competitions and support Site Offices in contract administration	• Support PNNL contract administration and extension	9/30/08				Wilken/ Wilson			62
		• Obtain Headquarters approval for PNNL Contract Acquisition Plan	10/31/07				Wilken/ Wilson			63
		• Obtain Headquarters approval for SLAC Contract Acquisition Plan	12/31/07				Wilken/ Wilson			64
		• Support site offices in development and evaluation of PEMP's	Ongoing				Wilken/ Wilson			65
	Implement effective and efficient ISC customer service delivery	• Implement effective communication tools for obtaining feedback from the site offices - complete set of customer focus calls with each SO Manager	12/30/07				Brown			66
		• Reissue updated ISC Service Plan	10/30/08				Brown			67



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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.	
				O C T	N O V	D E C					
<b>DOE Strategic Plan and President's Management Agenda</b>											
<b>Strategic Theme 1: Energy Security--</b> Promoting America's energy security through reliable, clean, and affordable energy.	<b>Goal 1.1: Energy Diversity</b> Increase our energy options and reduce dependence on oil, thereby reducing vulnerability to disruptions and increasing the flexibility of the market to meet U.S. needs.	<b>Global Nuclear Energy Partnership (GNEP) Program</b>									
		• Facilitate approval of execution of the Voloxidation Powder Transportation Safety Document	1/7/08				Moore				68
		• Support plans for Gas Trapping for Hot Cell Dissolutions activities at Building 7920	1/31/08				Moore				69
	• Support plans for Voloxidation with Gas Trapping activities at Building 3525	1/31/08				Moore				70	
	<b>Goal 1.2: Environmental Impacts of Energy</b> Improve the quality of the environment by reducing greenhouse gas emissions and environmental impacts to land, water, and air from energy production and use.	• Support partnerships with TVA and private industry to support nuclear fuel initiatives	8/1/08				Hamilton				71
	<b>Goal 1.3: Energy Infrastructure</b> Create a more flexible, more reliable, and higher capacity U.S. energy infrastructure.	• Complete engineering analysis and design for the Transmission Power Electronics Test (TPET) Facility	9/30/08				Moore				72

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Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.	
				O C T	N O V	D E C					
		<ul style="list-style-type: none"> <li>Support the National Transportation Research Center in establishing the US Automotive Partnership for Advance Research and Technologies to accelerate commercialization of energy efficient technologies through a Federal/State/supplier-based partnership</li> </ul>	9/30/08				Moore			73	
	<b>Goal 1.4: Energy Productivity</b> Cost-effectively improve the energy efficiency of the U.S. economy	<ul style="list-style-type: none"> <li>Support progress on Transformational Energy Action Management Initiative during FY 2008 at ORNL</li> </ul>	09/30/08				Moore		Cross reference to Item Nos. 45 and 53	74	
<b>Support NE Missions Affecting USEC</b>											
		<ul style="list-style-type: none"> <li>Quarterly, provide DOE NE with an evaluation of production capability of Paducah Gaseous Diffusion Plant</li> </ul>	12/15/07 3/15/08 6/15/08 9/15/08				Clark				75
		<ul style="list-style-type: none"> <li>Assure extension of Cooperative Research and Development Agreement (CRADA) for the Development of Economically Attractive Gas Centrifuge Machine and Process</li> </ul>	10/1/07				Clark				76
		<ul style="list-style-type: none"> <li>Lead Cascade operational and generating product assay in a range useable by commercial power plants (10/20/06 USEC letter)</li> </ul>	10/31/07				Clark				77
		<ul style="list-style-type: none"> <li>Financing commitment secured for a 1 MM SWU Centrifuge Plant (10/20/06 USEC letter)</li> </ul>	1/31/08				Clark				78
		<ul style="list-style-type: none"> <li>Extension of Centrifuge Deployment Project (K-1600) Lease Agreement</li> </ul>	1/31/08				Clark				79

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Perform assessment to assure Paducah Security Police are adequately trained and certified to carry weapons</li> </ul>	10/11/07				Clark			80
		<ul style="list-style-type: none"> <li>Perform assessment to assure Portsmouth Security Police are adequately trained and certified to carry weapons</li> </ul>	6/30/08				Clark			81
		<ul style="list-style-type: none"> <li>Provide power requirements to Paducah with EEI contract extension</li> </ul>	12/31/07				Clark/ Wilken			82
<b>Strategic Theme 2: Nuclear Security</b> -- Ensuring America's nuclear security.	<b>Goal 2.2: Weapons of Mass Destruction</b> Prevent the acquisition of nuclear and radiological materials for use in weapons of mass destruction and in other acts of terrorism.	<ul style="list-style-type: none"> <li>Complete Phase I of Mobile Uranium Processing Facility for Global Threat Reduction Initiative</li> </ul>	12/28/07				Moore			83
		<ul style="list-style-type: none"> <li>Provide support for Russian/US HEU Transparency Cylinder and Special Monitoring Visits</li> </ul>	12/31/08				Clark			84
<b>Strategic Theme 3: Scientific Discovery &amp; Innovation</b> --Strengthening U.S. Scientific discovery, economic competitiveness, and improving quality of life through innovations in science and technology	<b>Goal 3.1: Scientific Breakthroughs</b> Achieve the major scientific discoveries that will drive U.S. competitiveness; inspire America; and revolutionize our approaches to the Nation's energy, national security, and environmental quality challenges.	<b>ITER Project</b>								
		<ul style="list-style-type: none"> <li>Complete EVMS Certification process by OECM</li> </ul>	5/30/08				Moore			85
		<ul style="list-style-type: none"> <li>Complete Pre-CD-2 Lehman Review of US ITER. Assuming IO baseline by March 2008</li> </ul>	6/27/08				Moore			86
		<ul style="list-style-type: none"> <li>Complete OECM EIR for CD-2. Assuming IO baseline by March 2008</li> </ul>	7/31/08				Moore			87
		<ul style="list-style-type: none"> <li>Complete CD-2 for US ITER. Assuming IO baseline by March 2008</li> </ul>	9/30/08				Moore			88

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				O C T	N O V	D E C				
<b>SNS Operations</b>										
		• Complete seven instruments and begin beam commissioning phase	9/30/08				Moore			89
		• Provide 2700 hours of neutron production studies	9/30/08				Moore			90
		• Provide 4000 total accelerator operating hours	9/30/08				Moore			91
		• Convert target inner reflector plug cooling to heavy water cooling	9/30/08				Moore			92
<b>CNMS Operations</b>										
		• Conduct CNMS User Meeting	12/31/07				Moore			93
		• Provide access and technical assistance/collaboration for 200 users at the CNMS	9/30/08				Moore			94
<b>Leadership Computing Project</b>										
		• Complete delivery of 250 Teraflops hardware	12/31/07				Moore			95
		• Complete site preparation for the Petaflops system	06/30/08				Moore			96
		• Complete acceptance of the 250 Teraflops upgrade of Jaguar	09/30/08				Moore			97
		• Complete delivery of the Petaflops system	12/31/08				Moore			98

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				O C T	N O V	D E C				
	<b>Goal 3.2: Foundations of Science</b> Deliver the scientific facilities, train the next generation of scientists and engineers, and provide the laboratory capabilities and infrastructure required for U.S. scientific primacy.	<b>HFIR</b>								
		<ul style="list-style-type: none"> <li>Meet or exceed SC operational goals (i.e., cycles) at a predictability rate of 90%</li> </ul>	09/30/08				Moore			99
		<b>SING I MIE Project (SNS)</b>								
		<ul style="list-style-type: none"> <li>Complete CD-4a (first instrument)</li> </ul>	03/31/08				Moore			100
		<ul style="list-style-type: none"> <li>Complete CD-4b (second instrument)</li> </ul>	09/30/08				Moore			101
		<b>SING II MIE Project (SNS)</b>								
		<ul style="list-style-type: none"> <li>Complete CD-2a (first instrument)</li> </ul>	01/31/08				Moore			102
		<ul style="list-style-type: none"> <li>Complete CD-2b (second and third instruments)</li> </ul>	09/30/08				Moore			103
		<b>Other</b>								
	<ul style="list-style-type: none"> <li>Complete occupancy of the Joint Institute for Biological Sciences</li> </ul>	12/31/07				Moore			104	

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Place over 800 student/teacher research participants at the Office of Science laboratories by ORISE in FY 2008</li> </ul>	09/30/08				Moore			105
		<ul style="list-style-type: none"> <li>Complete design of the South Campus Californium Source Teaching Laboratory at ORISE</li> </ul>	09/30/08				Moore			106
		<ul style="list-style-type: none"> <li>Complete ORNL Electrical Capacity Upgrades</li> </ul>	12/31/08				Moore			107
		<ul style="list-style-type: none"> <li>Support the ORISE Research Participation Program</li> </ul>	Ongoing				Hamilton			108
<b>Genomes to Life (GTL) Bioenergy Research Center</b>										
		<ul style="list-style-type: none"> <li>Review and approve Bioenergy Research Center subcontracts for completion of first year tasks, goals, and objectives</li> </ul>	12/01/07				Moore			109
		<ul style="list-style-type: none"> <li>Review and approve capital equipment purchases, if necessary, for year one within six months of Bioenergy Research Center startup</li> </ul>	04/01/08				Moore			110
		<ul style="list-style-type: none"> <li>Support the Bioenergy Research Center goal of implementation of a High-throughput (HTP) pretreatment and characterization process to screen the structure, composition, and decomposition of approximately 5000 samples per month to identify the most promising samples for more detailed characterization</li> </ul>	09/30/08				Moore			111

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				O C T	N O V	D E C				
	<b>Goal 3.3: Research Integration</b> Integrate basic and applied research to accelerate innovation and to create transformational solutions for energy and other U.S. needs.	<b>Inorganic Membrane Program</b>								
		• Support completion of three nonproliferation reviews for new inorganic membranes	09/30/08				Moore			112
	<b>Goal 4.1: Environmental Cleanup</b> Complete cleanup of the contaminated nuclear weapons manufacturing and testing sites across the U.S.	<b>IFDP</b>								
		• Submit IFDP CD-1 for approval	06/30/08				McCracken			113
		• Receive AE approval	09/30/08				McCracken			114
		<b>EM Baseline</b>								
		• Submit the near-term baseline and have a validated baseline	12/31/07				McCracken			115
		<b>K-25 / K-27</b>								
		• Centrifuge and Y-12 Classified Material - Complete disposition and issuance of final report	4/30/08				McCracken			116
		• Nickel and Classified Chemicals - Complete disposition and issuance of final report	9/30/08				McCracken			117
		• Begin K-25 West Wing Demolition	10/1/08				McCracken			118

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Establish that the K-25 West Unit 306-02 meets the criteria and conditions for Crit Incredibility as defined in NCSE-ET-K-25-1632</li> </ul>	10/30/07				McCracken			119
		<ul style="list-style-type: none"> <li>Start K-25 East Wing Vent, Purge and Drain</li> </ul>	12/21/07				McCracken			120
		<ul style="list-style-type: none"> <li>Start K-25 East Wing High Risk Equipment Removal</li> </ul>	2/7/08				McCracken			121
<b>MSRE</b>										
		<ul style="list-style-type: none"> <li>Complete defueling</li> </ul>	2/28/08				McCracken			122
<b>U233 Building 3019 Project</b>										
		<ul style="list-style-type: none"> <li>Awarding of Long Lead Procurement</li> </ul>	6/30/08				McCracken			123
		<ul style="list-style-type: none"> <li>Start dismantling</li> </ul>	1/31/08				McCracken			124
<b>TRU Facility</b>										
		<ul style="list-style-type: none"> <li>Start hot-operations for processing remote handled TRU debris</li> </ul>	2/29/08				McCracken			125
		<ul style="list-style-type: none"> <li>Complete WIPP limited certification for CH-TRU debris</li> </ul>	3/31/08				McCracken			126
		<ul style="list-style-type: none"> <li>Achieve WIPP certification for RH-TRU debris and remaining CH-TRU debris</li> </ul>	9/30/08				McCracken			127



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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Process 200m<sup>3</sup> of CH-TRU Debris to meet STP milestone</li> </ul>	9/30/08				McCracken			128
		<ul style="list-style-type: none"> <li>Obtain Headquarters decision on exercising option period</li> </ul>	10/31/07				Wilken/ Wilson			129
<b>EMWMF</b>										
		<ul style="list-style-type: none"> <li>Verify that EMWMF is ready to ramp up and accept increased shipments from K-25/27 project</li> </ul>	3/31/08				McCracken/ Holden			130
<b>ETTP R/A</b>										
		<ul style="list-style-type: none"> <li>Complete backfilling of the K-1401 basement</li> </ul>	12/28/07				McCracken			131
<b>ETTP D&amp;D</b>										
		<ul style="list-style-type: none"> <li>Complete K-1401 disposal of Tc-99 waste that exceeds the EMWMF WAC</li> </ul>	11/30/07				McCracken			132
<b>BJC Contract Restructure</b>										
		<ul style="list-style-type: none"> <li>Complete negotiations on the Legacy Waste and Melton Valley milestones</li> </ul>	TBD				McCracken			133
		<ul style="list-style-type: none"> <li>Complete negotiations of 24 completed work activities</li> </ul>	TBD				McCracken			134
		<ul style="list-style-type: none"> <li>Complete negotiations on FY 07/08 work scope incentives</li> </ul>	TBD				McCracken			135

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Complete negotiations on incentives for work previously excluded from target scope</li> </ul>	TBD				McCracken			136
		<ul style="list-style-type: none"> <li>Complete negotiations on work in progress, but not yet completed, associated with the final 2 contractual milestones</li> </ul>	TBD				McCracken			137
		<ul style="list-style-type: none"> <li>Execute modification to BJC contract</li> </ul>	TBD				McCracken			138
<b>ETTP Fire Station</b>										
		<ul style="list-style-type: none"> <li>Implement MOA with City of Oak Ridge for Fire Protection and Emergency Response Services</li> </ul>	10/30/07				Clark			139
		<ul style="list-style-type: none"> <li>Transfer ETTP Fire Station to the City of Oak Ridge</li> </ul>	12/31/07				Clark			140
<b>ETTP Water Plant</b>										
		<ul style="list-style-type: none"> <li>Transfer ETTP Water Plant to the City of Oak Ridge</li> </ul>	3/31/08				Clark			141
<b>K-1000</b>										
		<ul style="list-style-type: none"> <li>Obtain Regulators approval on draft CDR for K-1000</li> </ul>	11/31/07				Clark			142
		<ul style="list-style-type: none"> <li>Issue K-1000 Transfer package to HQ</li> </ul>	1/31/08				Clark			143

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				O C T	N O V	D E C					
<b>Heritage Center Phase I</b>											
		• Transfer ED-7 to CROET	11/30/07				Clark			144	
		• Transmit ED-5 West Transfer Package to HQ	02/29/08				Clark			145	
		• Transmit ED-4 Transfer Package to HQ	05/31/08				Clark			146	
		• Transmit ED-3 Transfer Package to HQ	09/30/08				Clark			147	
<b>Oak Ridge Science and Technology Park</b>											
		• Complete NEPA Environmental Assessment	4/30/08				Clark			148	
<b>Strategic Theme 5: Management Excellence</b> Enabling the mission through sound management	<b>Goal 5.1: Integrated Management</b> Institute an integrated business management approach throughout DOE with clear roles and responsibilities and accountability to include effective line management oversight by both Federal and contractor organizations.	• Revise the ORO ISM System Description	9/30/08				Kelly			149	
		• Issue ORO Annual ISMS Declaration	11/1/08				Kelly/ Smyth			150	
		• Develop ORO QA Program Implementation Plan for ISO 9001	6/30/08				Kelly/ Smyth			151	
	<b>Goal 5.2: Human Capital</b> Ensure that the DOE workforce is capable of meeting the challenges of the 21st Century by attracting, motivating, and retaining a highly skilled and diverse workforce to do the best job.	• Employees understand requirements of their positions, are provided timely feedback by supervisors, and are offered training to assist in meeting job requirements									152
		▶ Certify current Federal Project Directors	Ongoing				Clark			153	
		▶ Ensure Contracting Officers are properly trained	Ongoing				Wilken/ Wilson			154	

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				O C T	N O V	D E C				
		▶ Complete 2007 Supervisory/Managerial Ratings	10/15/07				Wilken/ Howse-Smith			155
		▶ Complete 2007 Non-Supervisory Ratings	10/22/07				Wilken/ Howse-Smith			156
		▶ Complete 2008 Supervisory/ Managerial Performance Plans	10/30/07				Wilken/ Howse-Smith			157
		▶ Complete 2008 Non-Supervisory Performance Plans	10/30/07				Wilken/ Howse-Smith			158
		▶ Complete 2008 Mid-Year Reviews	4/18/08				Wilken/ Howse-Smith			159
		● Complete 2007 SES Performance Evaluations	10/31/07				Wilken/ Howse-Smith			160
		● Complete 2008 SES Mid-Year Reviews	4/18/08				Wilken/ Howse-Smith			161
		● Organization maintains an environment characterized by inclusiveness of individual differences and is responsive to the needs of a diverse workforce	9/30/08				Smith			162
		▶ Complete Annual Diversity Training	6/30/08				Smith			163
		▶ Complete Annual Sexual Harassment Training	3/31/08				Smith			164
		● Review annual Confidential Financial Disclosure Reports (OGE Form 450) from employees required to file	2/15/08				Thress			165
		● Submit Public Financial Disclosure Reports (SF-278) from employees required to file to OGC	5/15/08				Thress			166
		● Complete Annual Ethics Training	12/31/07				Thress			167

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				O C T	N O V	D E C					
	<b>Goal 5.3: Infrastructure</b> Build, modernize, and maintain facilities and infrastructure to achieve mission goals and ensure a safe and secure workplace.	• Support the completion of a study for implementing renewable energy projects on site	7/31/08				Moore			168	
		<b>Modernization of Laboratory Facilities</b>									
		• Support attainment of critical decisions and milestones for the Modernization of Laboratory Facilities	9/30/08				Moore		Cross reference to Item 31	169	
		<b>West Campus Improvements</b>									
		• Complete renovations in Buildings 1504 and 1505	5/30/08				Moore			170	
	• Support final design and initiation of construction of West Campus Improvements Project	5/30/08				Moore			171		
	<b>Goal 5.4: Resources</b> Institutionalize a fully integrated resource management strategy that supports mission needs and postures the Department for continuous business process improvement.	<b>Improved Financial Management</b>									
		• Comply with the OMB and Departmental analytical reporting schedule with accurate, timely, useful, and reliable financial information				Perry/ Fitchpatrick			172		
		▶ No significant audit findings within ORO's control related to the financial statements (year-end)	9/30/08				Perry/ Fitchpatrick		173		
		▶ OR meets STARS monthly closing requirements	Ongoing				Perry/ Fitchpatrick		174		
▶ Implement Phase I DOE-PAC process		3/31/08				Perry/ Fitchpatrick		175			

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				O C T	N O V	D E C				
		▶ Transition office to new GSA SmartPay Travel Card	11/29/08				Penry/ Fitchpatrick			176
		● Preparation of FY 2008 Assurance Memorandum results in quality product and timely submission	8/15/08				Penry/ Payne			177
		● Implement A-123 at ORO compliant with OMB and HQ requirements including timely assurances to HQ	9/1/08				Penry/ Payne			178
		● Ensure payments are made on time and accurately						Penry/ Fitchpatrick		179
		▶ 95% of payments are processed on time with compliance of erroneous payments metrics	Monthly				Penry/ Fitchpatrick			180
		▶ 96% of commercial payments are made by EFT or ORO	Monthly				Penry/ Fitchpatrick			181
		▶ Interest and penalties paid on payments subject to prompt payment are <.02% of total invoices	Monthly				Penry/ Fitchpatrick			182
		▶ Purchase card accounts are paid currently with no balances > 61 days	Monthly				Penry/ Fitchpatrick			183
		▶ Centrally billed travel cards are paid currently with no balances > 61 days	Monthly				Penry/ Fitchpatrick			184
		● Take active role in managing the IFDP budget strategy including coordinating between PSOs for IFDP execution	Monthly				Penry/ Hackett			185
		● Support the HQ SC COO budget process improvement initiative by resequencing local processes to comply with any new SC processes	3/15/08				Penry/ Hackett			186

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Develop strategy for program direction funding limitation</li> </ul>	12/31/07				Penry/ Hackett			187

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				O C T	N O V	D E C				
		<b>Expanded Electronic Government</b>								
		<ul style="list-style-type: none"> <li>• Serve as a leader in I-MANAGE initiatives and implementation of STRIPES financial interfaces</li> </ul>	06/30/08				Penry/ Hackett			188
		<ul style="list-style-type: none"> <li>• Provide team member for Standard Budget System (SBS) development</li> </ul>	09/30/08				Penry/ Hackett			189
		<ul style="list-style-type: none"> <li>▶ Provide staff to participate in vendor demonstrations</li> </ul>	10/31/07				Penry/ Hackett			190
		<ul style="list-style-type: none"> <li>• Participate on STRIPES team for procurement system interfaces, contract clause development, testing, and implementation</li> </ul>	09/30/08				Wilken/ Wilson			191



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				O C T	N O V	D E C				
<b>ORO Federal Management and Infrastructure</b>										
	Perform work safely and provide safe workplace for all employees.	• Meet the .65 goal for Total Recordable Cases (TRC) for ORISE	9/30/08				Moore			192
		• Meet the .25 goal for Days Away, Restricted, or Transferred (DART) for ORISE	9/30/08				Moore			193
		• Review and approve respective DOELAP accreditation and corrective action plans	9/30/08				Moore			194
		• Meet the 1.3 goal for Total Recordable Cases (TRC) for BJC	9/30/08				McCracken			195
		• Meet the .6 goal for Days Away, Restricted or Transferred (DART) for BJC	9/30/08				McCracken			196
		• Meet the 1.3 goal for Total Recordable Cases (TRC) for Isotek	9/30/08				McCracken			197
		• Meet the .6 goal for Days Away, Restricted or Transferred (DART) for Isotek	9/30/08				McCracken			198
		• Meet the 1.3 goal for Total Recordable Cases (TRC) for FWENC	9/30/08				McCracken			199
		• Meet the .6 goal for Days Away, Restricted or Transferred (DART) for FWENC	9/30/08				McCracken			200
		• Complete ORO Contractor Assurance Assessment and report results to SC HQ	12/31/07				Kelly/ Smyth			201
	• Perform at least two ORO Manager Level ES&H Program Assessments	9/30/08				Kelly/ Smyth			202	

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				O C T	N O V	D E C				
Ensure that performance and capabilities of contracted entities remain proficient and responsive.	Ensure that performance and capabilities of contracted entities remain proficient and responsive.	• Modify Memoranda of Understanding with local law enforcement agencies	4/30/08				Douglas			203
		• Provide support to CORs for conducting annual contractor performance evaluations	6/1/08				Wilken/ Wilson			204
	Ensure that Emergency Management approaches and measures remain timely and relevant.	• Distribute annual ERO refresher training	6/30/08				Douglas			205
		• Conduct Emergency Management Team Self-Assessment	7/31/08				Douglas			206
		• Conduct FY 2008 Lead Federal Manager Exercise	8/30/08				Douglas			207
		• Conduct JIC tabletop exercise	8/30/08				Douglas			208
		• Conduct RAP annual self assessment	9/30/08				Douglas			209
		• Conduct two Federal Building exercises	9/30/08				Douglas			210
		• Conduct assessments of five elements of ORO Emergency Management Program	9/30/08				Douglas			211
		Provide Oak Ridge Reservation (ORR) services to effectively and efficiently support mission needs	• Award Telecommunications contract	3/1/08				Wilken/ Price/ Wilson		
• Award Communications contract	11/30/00					Wilken/ Price/ Wilson			213	

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				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Assist Thomas Jefferson in performing their Contractor Assurance System Assessment</li> </ul>	12/31/07				Kelly/Smyth			214
	Effective land-use planning	<ul style="list-style-type: none"> <li>Revise the Comprehensive Integrated Plan (CIP), including stakeholder input, as the primary land-use document at ORO</li> </ul>	12/1/07				Wilken/Spoons			215
	Effectively manage the reservation's excess/surplus facilities and land	<ul style="list-style-type: none"> <li>Convey the title of DOE land known as ED-6 to the City of Oak Ridge</li> </ul>	12/1/07				Wilken/Wilson/Hunter			216
		<ul style="list-style-type: none"> <li>AMSE Museum and other land parcels to the AMSE Foundation</li> </ul>	12/1/07				Wilken/Wilson/Hunter			217
	Support FTCP commitments	<ul style="list-style-type: none"> <li>Complete ORO FTCP Accreditation Review</li> </ul>	9/30/08				Kelly/Smyth			218
	Implement a long-range historic preservation strategy that includes the American Museum of Science and Energy	<ul style="list-style-type: none"> <li>Finalize the ORO Manhattan Project Strategic Plan</li> </ul>	On hold indefinitely				Kelly			219
		<ul style="list-style-type: none"> <li>Prepare the Final Manhattan Project Strategic Plan</li> </ul>	On hold indefinitely				Kelly			220
		<ul style="list-style-type: none"> <li>Transmit final Strategic Plan to Stakeholders for review/comment</li> </ul>	On hold indefinitely				Kelly			221
		<ul style="list-style-type: none"> <li>Resolve Stakeholder comments</li> </ul>	On hold indefinitely				Kelly			222
		<ul style="list-style-type: none"> <li>Issue Final Strategic Plan</li> </ul>	On hold indefinitely				Kelly			223
	Effectively manage prime contracts consistent with contract management strategies and organizational plans.	<ul style="list-style-type: none"> <li>Complete draft FY 2007 performance evaluation of ORNL</li> </ul>	12/31/07				Moore			224

## Oak Ridge Office Annual Performance Plan

**FY 2008**

Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
		• Complete FY 2007 performance evaluation of ORISE	12/31/07				Moore			225
		• Submit ORNL Site Utilization and Management Plan for HQ approval	4/8/08				Moore			226
		• Support submittal of the ORNL Ten Year Site Plan for HQ approval	6/30/08				Moore			227
		• Submit to DOE/HQ-SC the FY 2009 UT-Battelle Performance Evaluation Plan	8/29/08				Moore			228
		• Complete FY 2009 ORISE Performance Plan	9/30/08				Moore			229
		• Develop extend/compete package for the ORNL contract	9/30/08				Moore/ Wilken			230
		• Complete the draft 2008 performance evaluation of UT-Battelle	12/31/08				Moore			231
		• Complete FY 2008 performance evaluation of ORISE	12/31/08				Moore			232
		• Negotiation of Collective Bargaining Agreement for WSI - SPFPA - Local 109 (ETTP)	10/30/07				Wilken/ Howse-Smith			233
	Utilize efficient technology transfer mechanisms and partnership tools to accomplish DOE missions and support national needs (SC7.3).	• Support ORNL's partnership with Walden Reserve, TVA and private industry to deploy a state-of-the-art distributed energy generation system in Cumberland County, Tennessee	9/30/08				Hamilton			234

## Oak Ridge Office Annual Performance Plan

**FY 2008**

Strategic Themes	Goals/Objectives	Measures	Target Date	Status			Point of Contact	Date Completed	Notes	Item No.
				O C T	N O V	D E C				
		<ul style="list-style-type: none"> <li>Support the establishment of the USAutoPARTS initiative</li> </ul>	4/1/08				Hamilton			235
		<ul style="list-style-type: none"> <li>Complete FY 2008 performance evaluation of UT-Battelle's Technology Transfer and Economic Development organization</li> </ul>	10/31/08				Moore			236
	Promote technology transfer and regional economic development.	<ul style="list-style-type: none"> <li>In coordination with TVA, support the transfer of efficiency technology to private industry</li> </ul>	Ongoing				Hamilton			237
	Support Homeland Security.	<ul style="list-style-type: none"> <li>Establish initial Chemical Facilities Security Computing Facility</li> </ul>	11/1/07				Moore			238
		<ul style="list-style-type: none"> <li>Establish Southeast Regional Research Initiative (SERRI) community and national resource by interacting with at least three communities</li> </ul>	9/30/08				Moore			239
		<ul style="list-style-type: none"> <li>DHS Scholars and Fellows Programs - Provide research opportunities for at least 5 scholars or fellows at ORNL</li> </ul>	9/30/08				Moore			240
	Environmental Compliance	<ul style="list-style-type: none"> <li>Coordinate and assist with issuance of NPDES Permit renewal for ORNL</li> </ul>	11/1/07				Moore			241
		<ul style="list-style-type: none"> <li>Evaluate renewed NPDES Permit and initiate changes to sampling, analysis, and reporting systems to ensure compliance with new requirements by the effective date of the Permit</li> </ul>	1/1/08				Moore			242

**Attachment 2**

**Oak Ridge Office**

**Science Integrated Assessment Schedule**

# ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

(SC-IAS Reviews of ORO for FY2008)

Data current to: 8/31/2007 11:26:23 AM

\*Data below is sorted by Organization Being Reviewed and Planned Start Date

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<b>ORO</b>										
<b>ORO - EM</b>										
1)Readiness Review for RH-TRU Waste Operations () <a href="#">(REV-K47-8/14/2007-39887)</a>	ORO - EM (ORNL)	ORO - EM	<u>Plan</u> 2/1/2008/ 2/28/2008  <u>Actual</u>	Conduct of Operations Configuration Management Criticality Safety Emergency Management Environment Fire Protection Industrial Hygiene Industrial Safety ISM - General Nuclear Safety Basis Packaging and Transportation Quality Assurance	Operational Readiness Review	DOE O 425.1C	N/A	No	McMillan, Bill/None Listed	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
				Radiation Protection						
2)Readiness Review for TRU Drum Venting () ( <a href="#">REV-K47-8/14/2007-80156</a> )	ORO - EM (ORNL)	ORO - EM	<u>Plan</u> 2/1/2008/ 5/1/2008  <u>Actual</u>	Conduct of Operations Configuration Management Emergency Management Environment Fire Protection Industrial Hygiene Industrial Safety Nuclear Safety Basis Packaging and Transportation Quality Assurance Radiation Protection	Operational Readiness Review	DOE O 425.1C	N/A	No	McMillan, Bill/None Listed	ORO
<b>ORO - FM</b>										
1)Prompt Pay/Quality Control Year-End Review () ( <a href="#">REV-QLO-8/27/2007-</a>	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2008/ 9/26/2008  <u>Actual</u>	Business Operations	Financial Audit	OMB Circular A-125	N/A	No	Braden, Kathy/None Listed	ORO



## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<a href="#">56354</a> )										
2)Year-End Review of Funds Control Process () ( <a href="#">REV-QLO-8/27/2007-62885</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2008/ 9/26/2008 <u>Actual</u>	Business Operations	Financial Mgmt System Review	OMB Circular A-34 & DOE Order 523.1	N/A	No	Payne, Jeffrey/None Listed	ORO
3)Annual Financial Management Systems Year-End Review () ( <a href="#">REV-QLO-8/27/2007-83205</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2008/ 9/26/2008 <u>Actual</u>	Business Operations	Financial Mgmt System Review	DOE Order 523.1	N/A	No	McKeehan, Jerry/None Listed	ORO
4)A-123 Validation Year-End Review () ( <a href="#">REV-QLO-8/27/2007-95243</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2008/ 9/26/2008 <u>Actual</u>	Business Operations	Financial Audit	OMB Circular A-123	N/A	No	Reed, Tom/None Listed	ORO
<b>ORO - MO - M5</b>										
1)Non-Supervisory Performance Ratings () ( <a href="#">REV-YVT-8/22/2007-8443</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 12/1/2007/ 2/27/2008 <u>Actual</u>	Diversity Programs	Management/Self-Assessments	DOE O 414.1C	N/A	No	Smith, Rufus/None Listed	ORO
2)ORO Incentive	ORO -	ORO -	<u>Plan</u>	Diversity	Management/Self-	DOE O	N/A	No	Smith,	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
Awards Program () ( <a href="#">REV-YVT-8/22/2007-65761</a> )	MO - M5 (ORO)	MO - M5	3/3/2008/ 6/27/2008  <u>Actual</u>	Programs	Assessments	414.1C			Rufus/None Listed	
3)Effective Implementation of Contractors Employee Concerns Program () ( <a href="#">REV-YVT-8/22/2007-33639</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 6/9/2008/ 9/5/2008  <u>Actual</u>	Diversity Programs	Functional	DOE O 442.1A	N/A	No	Smith, Rufus/None Listed	ORO
<b>ORO - SC</b>										
1)Contractor Assurance/ISMS Review of ORISE ( <a href="#">OS-646</a> ) ( <a href="#">REV-MJ8-8/24/2006-71093</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 12/1/2007/ 12/30/2007  <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/Carden, David	ORO
2)Lehman Review - SING II OPA Review ( <a href="#">OS-885</a> ) ( <a href="#">REV-MJ8-1/30/2007-89840</a> )	ORO - SC (ORNL)	HQ - SC - BES	<u>Plan</u> 12/1/2007/ 1/31/2008  <u>Actual</u>	Project Management	Project Review	BES & DOE O 413.3A	Yes/ N/A	No	Brown, Thomas /None Listed	HQ - SC
3)Effectiveness Review of FY	ORO - SC	ORO - SC	<u>Plan</u> 1/1/2008/	Emergency Management	Effectiveness Review	DOE O 414.1C	N/A	No	Davis, Bobby Joe/None	

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
2005 HSS Emergency Management Assessment () ( <a href="#">REV-2CD-8/13/2007-65294</a> )	(ORNL)		2/4/2008  <u>Actual</u>						Listed	
<b>4</b> Hoisting and Rigging Program - UT-B and ORISE ( <a href="#">OS-704</a> ) ( <a href="#">REV-G19-8/25/2006-4187</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 1/1/2008/ 3/31/2008  <u>Actual</u>	Industrial Safety	ES&H Oversight	DOE O 440.1 DOE O 226.1	N/A	No	Fair, Randy/None Listed	ORO
<b>5</b> Fire Protection Program - ORISE ( <a href="#">OS-705</a> ) ( <a href="#">REV-MJ8-8/24/2006-63256</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2008/ 9/30/2008  <u>Actual</u>	Fire Protection	Regulatory Oversight	DOE O 440.1 DOE O 226.1	N/A	No	Carden, David/Not Assigned	ORO
<b>6</b> Contractor Assurance/ISMS Review of ORNL ( <a href="#">OS-706</a> ) ( <a href="#">REV-MJ8-8/24/2006-63836</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2008/ 9/30/2008  <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/None Listed	ORO
<b>ORO Manager's Independent Assessments</b>										
<b>1</b> Implementation of ORO Contractor(s)	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 10/1/2007/	ISM - General	Managers Independent Assessment	DOE O 226.1 Para. 5.b (10),	N/A	No	Monroe, Harold/Perry, Teresa	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
Assurance Systems and Federal Oversight (OS-708) (REV-YVT-9/1/2006-76794)			12/28/2007  <u>Actual</u>			Memo from G.Malosh 8/2				
2)ORO Contractor Work Control, Change Management and Communication (Initial Plan: 1st Qtr- ORAU, Wackenhut, FWENC, 2nd Qtr- UTB, 3rd Qtr- BJC, 4th Qtr- Isotek and AMA Contractors) () (REV-4TP-8/21/2007-25912)	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 10/1/2007/ 9/30/2008  <u>Actual</u>	Conduct of Operations ISM - General	Managers Independent Assessment	DOE O 226.1, ISMS, Trending analysis of occurrence	N/A	No	Smyth, Randy/None Listed	ORO
3)Evaluation of ORO Transportation-Focus on AMEM planned increase in truckloads () (REV-4TP-	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 1/1/2008/ 1/31/2008  <u>Actual</u>	Packaging and Transportation	Managers Independent Assessment	Management request perform Management Assessment o	N/A	No	Smyth, Randy/None Listed	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<a href="#">8/23/2007-23010</a> )										
4)Evaluation of ORO Hoisting and Rigging & Fall Protection ( <a href="#">OS-651</a> ) ( <a href="#">REV-YVT-8/31/2006-18972</a> )	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 2/2/2008/ 3/13/2008  <u>Actual</u>	Industrial Safety	Managers Independent Assessment	DOE O 414.1C, ORO M 220.1, DOE O 226.1	N/A	No	Kelly, Larry/Davis, Bobby Joe	ORO
5)Evaluation of ORO Electrical Safety ( <a href="#">OS-710</a> ) ( <a href="#">REV-YVT-8/31/2006-94263</a> )	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 7/14/2008/ 8/15/2008  <u>Actual</u>	Industrial Safety	Managers Independent Assessment	DOE O 414.1C, DOE O 440, also address issues that	N/A	No	Kelly, Larry/None Listed	ORO

Total number of planned assessments for FY 2008 = 20

# ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

(SC-IAS Reviews of ORO - All for FY2009)

Data current to: 8/31/2007 11:26:23 AM

\*Data below is sorted by Organization Being Reviewed and Planned Start Date

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<b>ORO</b>										
<b>ORO - EM</b>										
1)ESH&QA - FWENC () ( <a href="#">REV-K47-8/28/2006-89944</a> )	ORO - EM (ORNL)	ORO - EM	<u>Plan</u> 7/1/2009/ 7/31/2009  <u>Actual</u>	Environment Industrial Hygiene Industrial Safety Quality Assurance Radiation Protection Facility Safety ISM - General Packaging and Transportation	Technical Assessment	DOE O 414.1C, 226.1, 440.1A, 460.2A, 433.1, 435.1,	N/A	No	Kadas, Karen/None Listed	ORO
<b>ORO - FM</b>										
1)Prompt Pay/Quality Control Year-End Review () ( <a href="#">REV-</a>	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2009/ 9/26/2009	Business Operations	Financial Audit	OMB Circular A-125	N/A	No	Braden, Kathy/None Listed	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<a href="#">QLO-8/27/2007-45538</a> )			<u>Actual</u>							
2)Year-End Review of Funds Control Process () ( <a href="#">REV-QLO-8/27/2007-49925</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2009/ 9/26/2009 <u>Actual</u>	Business Operations	Financial Mgmt System Review	OMB Circular A-34 & DOE O 523.1	N/A	No	Payne, Jeffrey/None Listed	ORO
3)Annual Financial Management Systems Year-End Review () ( <a href="#">REV-QLO-8/27/2007-57816</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2009/ 9/26/2009 <u>Actual</u>	Business Operations	Financial Mgmt System Review	DOE O 523.1	N/A	No	McKeehan, Jerry/None Listed	ORO
4)A-123 Validation Year-End Review () ( <a href="#">REV-QLO-8/27/2007-95759</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2009/ 9/28/2009 <u>Actual</u>	Business Operations	Financial Audit	OMB Circular A-123	N/A	No	Reed, Tom/None Listed	ORO
<b>ORO - MO - M5</b>										
1)Non-Supervisory Performance Ratings () ( <a href="#">REV-YVT-8/22/2007-75419</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 12/1/2008/ 2/27/2009 <u>Actual</u>	Diversity Programs	Management/Self-Assessments	DOE O 414.1C	N/A	No	Smith, Rufus/None Listed	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
2)ORO Incentive Awards Program () ( <a href="#">REV-YVT-8/22/2007-39190</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 3/2/2009/ 6/26/2009 <u>Actual</u>	Diversity Programs	Management/Self-Assessments	DOE O 414.1C	N/A	No	Smith, Rufus/None Listed	ORO
3)Effective Implementation of Contractor's Employee Concerns Program () ( <a href="#">REV-YVT-8/22/2007-10133</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 6/1/2009/ 9/4/2009 <u>Actual</u>	Diversity Programs	Functional	DOE O 442.1A	N/A	No	Smith, Rufus/None Listed	ORO
<b>ORO - SC</b>										
1)Packaging & Transportation Safety Program ( <a href="#">OS-758</a> ) ( <a href="#">REV-G19-8/25/2006-51211</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 1/1/2009/ 3/31/2009 <u>Actual</u>	Packaging and Transportation	ES&H Oversight	DOE O 460.2 DOE O 461.1B DOE O 226.1	N/A	No	Carden, David/Willaford, Dana	ORO
2)Facility Safety (10 CFR 830 Implementation) at ORNL Facilities ( <a href="#">OS-759</a> ) ( <a href="#">REV-G19-8/25/2006-48747</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 6/1/2009/ 8/31/2009 <u>Actual</u>	Facility Safety	Regulatory Oversight	10 CFR 830	N/A	No	Persinger, Randy/Persinger, Randy	ORO



## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
3)Fire Protection Program - ORNL ( <a href="#">OS-761</a> ) ( <a href="#">REV-MJ8-8/24/2006-54466</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2009/ 9/30/2009 <u>Actual</u>	Fire Protection	ES&H Oversight	DOE O 440.1 DOE O 226.1	N/A	No	Carden, David/Smith, Patrick N	ORO
4)Contractor Assurance/ISMS Review of ORNL ( <a href="#">OS-762</a> ) ( <a href="#">REV-MJ8-8/24/2006-85612</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2009/ 9/30/2009 <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/Carden, David	ORO
5)Contractor Assurance/ISMS Review of ORISE ( <a href="#">OS-763</a> ) ( <a href="#">REV-MJ8-8/24/2006-9758</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2009/ 9/30/2009 <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/Carden, David	ORO
<b>ORO - SE</b>										
1)Federal Technical Capability Program (FTCP) Accreditation Review ( <a href="#">OS-603</a> ) ( <a href="#">REV-4TP-8/24/2006-22096</a> )	ORO - SE (ORO)	ORO - SE	<u>Plan</u> 12/1/2008/ 1/31/2009 <u>Actual</u>	Quality Assurance	External Review	DOE M 426.1-1A	N/A	No	Kelly, Larry/Kelly, Larry Vosburg, Jim	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<b>ORO Manager's Independent Assessments</b>										
1)ORO Management Assessment of PAAA, 10 CFR 850, and 10 CFR 851 ( <a href="#">OS-665</a> ) ( <a href="#">REV-4TP-8/30/2006-96378</a> )	ORO - MO (ORO)	ORO - MO	<u>Plan</u> 1/5/2009/ 3/31/2009  <u>Actual</u>	Quality Assurance ISM - General	Managers Independent Assessment	DOE O 226.1	N/A	No	Casteel, Roger/None Listed	ORO

Total number of planned assessments for FY 2009 = 15

# ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

(SC-IAS Reviews of ORO - All for FY2010)

Data current to: 8/31/2007 11:26:23 AM

\*Data below is sorted by Organization Being Reviewed and Planned Start Date

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/Support Office/Amount	Completed?	Local Contact/Team Lead	Sponsor
<b>ORO</b>										
<b>ORO - EM</b>										
1)ESH&QA - Isotek () ( <a href="#">REV-K47-8/15/2007-13154</a> )	ORO - EM (ORNL)	ORO - EM	<u>Plan</u> 9/1/2010/ 9/30/2010  <u>Actual</u>	Environment Industrial Hygiene Industrial Safety Quality Assurance Radiation Protection Facility Safety ISM - General Packaging and Transportation	Technical Assessment	DOE O 414.1C, 226.1, 440.1A, 460.2A, 433.1, 435.1,	N/A	No	Kadas, Karen/None Listed	ORO
<b>ORO - FM</b>										
1)Annual Financial Management Systems Year-End Review () ( <a href="#">REV-</a>	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/1/2010/ 9/26/2010	Business Operations	Financial Mgmt System Review	DOE O 523.1	N/A	No	McKeehan, Jerry/None Listed	ORO

## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
<a href="#">QLO-8/27/2007-87727</a> )			<u>Actual</u>							
2)A-123 Validation Year-End Review () ( <a href="#">REV-QLO-8/27/2007-89888</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2010/ 9/26/2010 <u>Actual</u>	Business Operations	Financial Audit	OMB Circular A-123	N/A	No	Reed, Tom/None Listed	ORO
3)Year-End Review of Funds Control Process () ( <a href="#">REV-QLO-8/27/2007-15701</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2010/ 9/26/2010 <u>Actual</u>	Business Operations	Financial Mgmt System Review	OMB Circular A-34 & DOE O 523.1	N/A	No	Payne, Jeffrey/None Listed	ORO
4)Prompt Pay/Quality Control Year-End Review () ( <a href="#">REV-QLO-8/27/2007-43521</a> )	ORO - FM (ORO)	ORO - FM	<u>Plan</u> 9/4/2010/ 9/26/2010 <u>Actual</u>	Business Operations	Financial Audit	OMB Circular A-125	N/A	No	Braden, Kathy/None Listed	ORO
<b>ORO - MO - M5</b>										
1)Non-Supervisory Performance Ratings () ( <a href="#">REV-YVT-8/22/2007-74232</a> )	ORO - MO - M5 (ORO)	ORO - MO - M5	<u>Plan</u> 12/7/2009/ 2/26/2010 <u>Actual</u>	Diversity Programs	Management/Self-Assessments	DOE O 414.1C	N/A	No	Smith, Rufus/None Listed	ORO
2)ORO Incentive	ORO -	ORO - MO	<u>Plan</u>	Diversity	Management/Self-	DOE O	N/A	No	Smith,	ORO

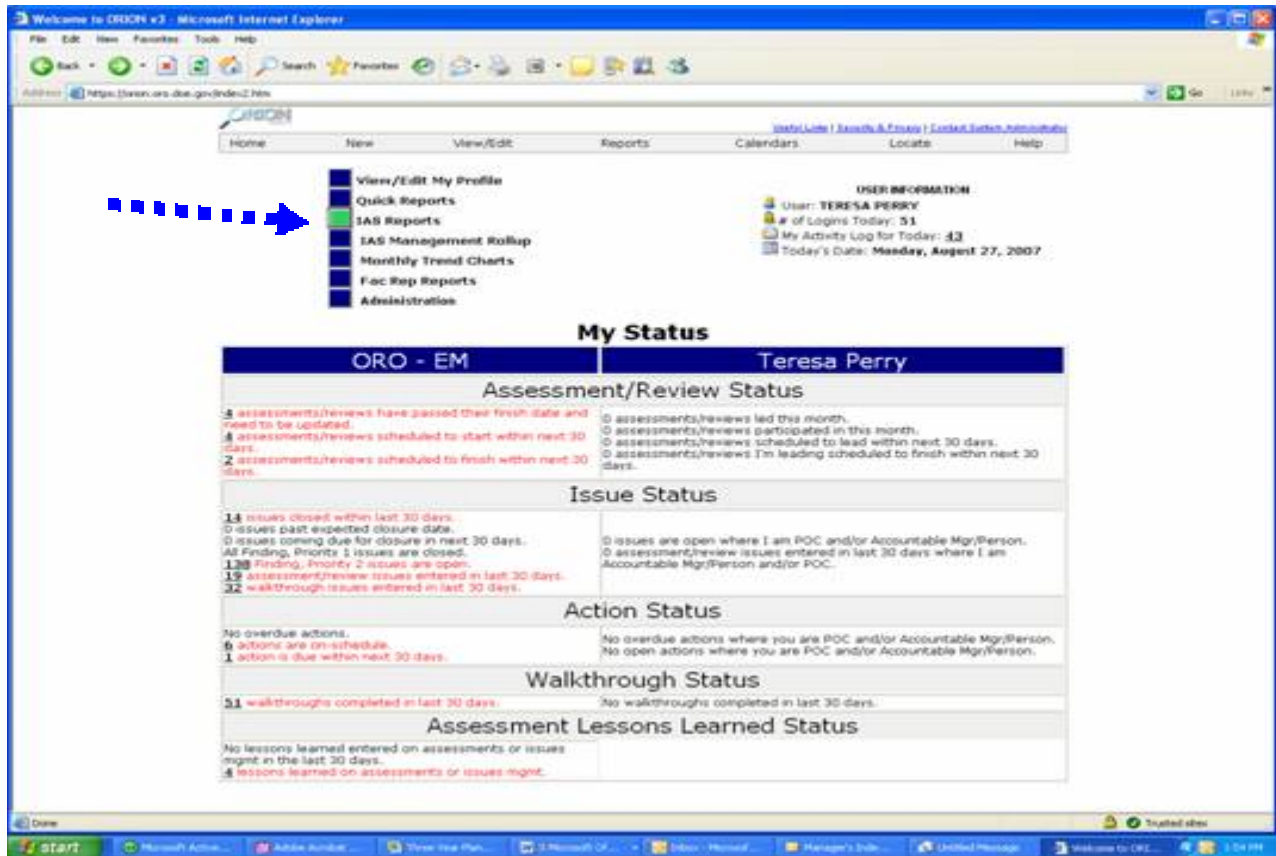
## ORO SC Integrated Assessment Schedule for FY 2008 – FY 2010

Subject (SMART ID) (ORION ID)	Org Reviewed (Site Reviewed)	Org Performing	Planned Start/Finish Actual Start/Finish	Functional Areas Covered	Assessment Type	Driver	Support Needed/ Support Office/ Amount	Completed?	Local Contact/ Team Lead	Sponsor
Awards Program () ( <a href="#">REV-YVT-8/22/2007-81524</a> )	MO - M5 (ORO)	- M5	3/8/2010/ 6/30/2010  <u>Actual</u>	Programs	Assessments	414.1C			Rufus/None Listed	
3)Effective Implementation of Contractors Employee Concerns Program () ( <a href="#">REV-YVT-8/22/2007-61579</a> )	ORO - MO - M5 (Other)	ORO - MO - M5	<u>Plan</u> 6/7/2010/ 9/30/2010  <u>Actual</u>	Diversity Programs	Functional	DOE O 442.1A	N/A	No	Smith, Rufus/None Listed	ORO
<b>ORO - SC</b>										
1)Contractor Assurance/ISM Review of ORNL () ( <a href="#">REV-2CD-8/13/2007-2077</a> )	ORO - SC (ORNL)	ORO - SC	<u>Plan</u> 9/1/2010/ 9/30/2010  <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/None Listed	
2)Contractor Assurance/ISMS Review of ORISE () ( <a href="#">REV-G19-8/27/2007-47</a> )	ORO - SC (ORISE)	ORO - SC	<u>Plan</u> 9/1/2010/ 9/30/2010  <u>Actual</u>	ISM - General	Regulatory Oversight	DOE O 226.1	N/A	No	Carden, David/None Listed	

Total number of planned assessments for FY 2010 = 10

# How to Run the ORO FY 2008 - FY 2010 SC IAS Report

1. Go to ORION at <https://orion.oro.doe.gov/index2.htm>
2. On the main page, select the button (turns from blue to green when you select it) for IAS Reports



- Under the SC IAS Reports list, using the 3<sup>rd</sup> report on the list, select ORO as the Office on the drop-down, and then select the button to get the SC-IAS assessments for ORO.

Welcome to ORION v3 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://orion.oro.doe.gov/index2.htm>

ORION Useful Links | Security & Privacy | Contact System Administrator

Home New View/Edit Reports Calendars Locate Help

User: TERESA PERRY

### SC-IAS Reports

Org Being Reviewed/Performing Review Year: 2008		FY Schedule of All Assessments (Includes SC-IAS, Site IAS and non-IAS Reviews)
Start: <input type="text"/> Finish: <input type="text"/> Office: <input type="text"/>		SC IAS Wall Chart - Field Reviews Only [Date Filtered] (SC-IAS Reviews performed on the organization)
Sponsoring Office: ORO		FY08-10 SC Integrated Assessment Schedule (SC-IAS Reviews performed on the organization) <b>**Use this report to generate the SC-IAS input to the SC Annual Performance Plan.</b>
Fiscal Year: 2008 Office: <input type="text"/>		SC Integrated Assessment Schedule (SC-IAS Reviews performed both on and by the organization)

### Site IAS Reports

Fiscal Year: 2008 Office: <input type="text"/>		Site Integrated Assessment Schedule (IAS Reviews performed both on and by the organization)
Fiscal Year: 2008 Office: <input type="text"/>		Site Integrated Assessment Schedule (IAS Reviews performed on the organization)
Sponsoring Office: <input type="text"/>		FY08-10 Site Integrated Assessment Schedule (Site IAS Reviews performed on the organization)

### User-Selected Reports

Start: <input type="text"/> Finish: <input type="text"/> Org Being Reviewed/Performing Review Select IAS level: SC-IAS		IAS Levels & User-selected date range (Filtered by Org; Grouped by Functional Area and Sorted by Planned Start Date)
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Done Trusted sites

start Microsoft Active... Adobe Acrobat... Three Year Plan... Microsoft Of... Inbox - Microsof... Manager's Inde... Untitled Message Welcome to ORI... 1:56 PM