

Department of Energy



Competitive Sourcing Executive Steering Group Meeting

October 30, 2002

Competitive Sourcing/A-76 FY 02/03 Study Status

Office of Competitive Sourcing/A-76

Functional Area Studies

Function	Team Lead	Positions (HQ/Field)	Locations (HQ/Field)
Information Technology	Karen Evans, CIO	420 (224/196)	14/19
Human Resources	Claudia Cross, ME	165+ (82/83)	24/19
Financial Services	Helen Sherman, ME	151 (60/91)	1/13
Logistics	Brian Costlow, ME	200+ (101/99)	3/12
Personnel Security Clearances (deferred by ESG)	Rosalie Jordan, SO	27 (0/27)	0/3
Paralegals (removed by ESG)		21 (9/12)	2/8
Civil Rights Reviews (Direct Conversion)	Frank Beserra, ED	8 (all HQ)	1/0
Graphics	Brian Costlow, ME	13 (all HQ)	1/0

ESG DECISIONS – JUNE 17, 2002

- **Approved Financial Services, Information Technology, Logistics, Human Resources, Graphics and Civil Rights Studies Actions Plans**

(Study Action Plans on www.ma.mbe.doe.gov/a-76)

- **IT Study:**

- Approved the one study of all IT FTEs concept including the potential addition of FTEs (beyond the 420 initially selected)
- Requested a reevaluation of the four year study time frame

- **Logistics Studies:**

- Requested a review of all logistics type FTEs, to include positions that may have been coded under inventory function codes not originally targeted

- **Human Resources Study:**

- Requested that all training FTEs, including those located in program offices, be reviewed for inclusion in the study

ADDITIONAL ESG DECISIONS

- **Two Teams appealed to ESG for removal from A-76 studies**
 - Paralegal - remove all 21 FTE from study - ESG agreed
 - Personnel Security Investigators - remove all 27 FTE from study - ESG agreed to suspend study subject to further review after NNSA Reengineering implementation



Current Study Status

- **Study teams are organized, support contractors selected**
- **Bi-monthly Functional Area Study Team Leaders meetings**
- **Overview training/VTC - Over 175 trained**
- **Town Hall field site A-76 meetings underway (350+attendees)**
- **A-76 management system selected [Commercial Activities Management Information System (CAMIS), Wincompare²]**
- **Conflicts of Interest rules developed**
- **Roles & responsibilities in the A-76 process under development (submitting to ESG for approval)**
 - **Appeals, SSA, TEP, MEO and PWS approvals**
- **DOE Inherently Governmental and Commercial Activities Inventory (FAIR Act) 2002 submitted by the Secretary to OMB on 6/27/02**



Future Actions

- Additional Funding to support current studies
- Expect to study more positions in 04/05
- Heads of Departmental Elements assistance in helping identify study positions for 2003/04/05 was requested
 - Responses to “Next Steps” memo request for study nominations being evaluated

OMB SCORECARD

Initiative	Current Status (As of September 30, 2002)	Progress in Implementing the President's Management Agenda	Comments
<p>Competitive Sourcing</p> <p>Agency Lead: Bruce Carnes</p>	<p style="text-align: center;"> Red</p> <ul style="list-style-type: none"> • DOE has not yet completed public-private competitions or direct conversions on 15 percent of its FY 2000 commercial activity inventory. • DOE has an approved 2002-03 Competitive Sourcing and Management Plan and has organization infrastructure in place to implement it. • DOE submitted a timely 2002 FAIR Act inventory in the required format. • DOE has initiated private public competitions on more than 1000 FTE which are scheduled to be completed in 2003-2006. 	<p style="text-align: center;"> Green</p> <p><u>Actions Taken Since June 30, 2002</u></p> <ul style="list-style-type: none"> • DOE's Executive Steering Group (ESG) approved studies, action plans and milestones for: Financial Services, Information Technology, Logistics, Human Resources, Graphics and Civil Rights. • DOE is conducting one study of all IT FTE including current contracted services. A four-year study time frame was requested but ESG asked that it be reevaluated. • Study teams are in place and trained; Support contractors selected; town hall site meetings are underway; information management system selected. <p><u>Planned Actions for Q1 FY 2003</u></p> <ul style="list-style-type: none"> • DOE Management Council and Program heads will help identify positions for future studies and were asked to consider potential insourcing and inter-service support agreements. • DOE will work with OMB on concerns identified in DOE's 2002 FAIR Act inventory (in NNSA and PMA programs) • Development of Performance Work Statements is ongoing – DOE will brief OMB/OFPP on status of all studies during Q1. 	<ul style="list-style-type: none"> • DOE's progress score remains "green," based on its continued emphasis and efforts to design and manage a competitive sourcing strategy that makes sense and will improve agency mission accomplishment. • DOE began development of Performance Work Statements for each functional study area in the last quarter but much of that work will still be underway in the next quarter. The first draft PWS (for financial services) is scheduled to be completed 11/30/02. • OMB is requesting a revised FAIR Act inventory for NNSA for the FY 2002 period, which more appropriately distributes the Commercial and Inherently Governmental inventories. NNSA's recent submission did not address concerns OMB expressed in the previous NNSA submission. • DOE should be able to move to "yellow" on status when OMB has greater assurance that DOE is preparing for beyond the 2003 aggregate goals and working toward the overall 50 percent goal.

DOE SCORECARD

	 Current Status (As of August 30, 2002)	 Progress in Implementing the President's Management Agenda	Comments
Initiative Competitive Sourcing DOE Lead: Denny O'Brien <u>PRIORITIES/CRITERIA:</u> <ul style="list-style-type: none"> ◆ FAIR Act Inventory ◆ Submit on time ◆ Verification Documentation ◆ Major Deviation from prior year ◆ ◆ A-76 Study Support ◆ Provided Functional candidates for future years ◆ Team Support ◆ Team resources support ◆ Team members ◆ Funding 			

ESG Issues

- Formal ESG Charter
- Interface of ongoing and future reorganizations with A-76 Studies
- Funding of FY 02/03 expansions/future studies
- Acquisition-GWAC vs. Full and Open contracts
- ESG Approvals
 - Conflicts of Interest, Guidebook, Roles and Responsibilities
 - FY 04 studies
- Approvals of PWS, MEOs, Appeals
 - Team chiefs, Procurement (acquisition issues), NNSA