

## PLEASE READ

NASEO prepared this sample template as an aid for states that want to use it to prepare their Energy Assurance Project Management Plan. Use of this template is entirely optional. The requirements for the Project Management Plan that need to be met are only those specified by the National Energy Technology Laboratory in the Funding Opportunity Announcement and SPO. Beyond these requirements it is solely at the states discretion as to whether they want to use any or part of this template. Created and provided chart is for illustrative purposes only - substitute your tasks, start dates, duration times & end dates. Some of the material in this document comes from the Tables and Gantt Chart. Changes on that chart are easy to make as well, provided you use that chart in Word 2007 format. Please see accompanying Instructions

## INSTRUCTIONS FOR USING NASEO ARRA ENERGY ASSURANCE PMP SAMPLE TEMPLATE

- The format of this PMP template is in accord with the FOA of 6-15-09, pp.25-30. This is the DOE's preferred format as stated at the NASEO Annual Meeting in Annapolis. You may wish to keep this document on hand because it contains the complete scope of the Project Management Plan.
- All areas highlighted in grey should be filled in with your jurisdiction's (e.g., state's) information.
- Your submission date should be 60 days after receipt of the date of the Grant Award.
- Some of the grey areas also contain parentheses with suggested material. Please complete based on your state's program.
- Table 1 under Project Management and Milestone Table Log was generated by an Excel spreadsheet, which accompanies this package.
  - In the Excel spreadsheet, changes made in the Task by Number column will be reflected in the legend on the accompanying Gantt chart.
  - Feel free to update this column as you see fit.
  - The following columns will also affect the Gantt chart
    - Start Date
    - Approximate Duration of Task in Days
    - DOE Completed Task End Date---etc.
  - NOTE: you may or may not want to include the Key Personnel column. It is not reflected on the Gantt chart.
- You may or may not wish to include as much detail as found in the template. More detail may better suit your state's internal project management.
- Grey and yellow highlights on Table 1 were included to emphasize critical review periods (so that plan development would not be unduly delayed) and Milestones. Green highlights emphasize training. Feel free to keep or remove these highlights to suit your state's needs.

- You may wish to consider showing an allocation of funds in a generalized monthly spending plan. Again, this may be more appropriate for your state's internal project management efforts.
- Some states have suggested including management planning tasks associated with multi-state coordination, including travel to related regional meetings and training. These items may not be needed for NETL, but are costs to consider, especially if traveling any distance.
- Task Descriptions.
  - These were written for a specific Energy Office, but are retained here to provide sample material you may consider using.
  - It is not clear that Task Descriptions are required in the PMP, but it does elaborate on the SOPO and gives reasons why the tasks are to be performed. Feel free to edit, change, and/or delete according to your state's needs. (Note: the DOE does require that a copy of your SOPO be included at the end of the Project Management Plan. Cut and paste the SOPO from your Notice of Award.)
- The Budget format was basically derived from the FOA. However, the state for which this template was originally prepared produced the budget sheet. Modify it as you deem necessary.
- The Gantt chart produced on the Spreadsheet when Table 1 was created is included here. It will be modified based on your edits to the attached spreadsheet.
- Success criteria relate to measurements that show the project is successful. The template contains suggestions that should be included, but more can be added.
- Reporting: The DOE Template does not require that you submit a reporting schedule. But, you may do so if you wish. As noted above, cut and paste your SOPO from the Financial Assistance Funding Opportunity Notice.

Please refer to Attachment 3 "Federal Assistance Reporting Checklist and Instructions" of the Terms and Conditions of the Assistance Agreement for your state. The reporting schedule is based on the Federal Fiscal Year (Oct 1 - Sep 30). Under the State EA grants, the first quarterly progress and financial reports (for the period of July 1 to Sep 30) are due 30 days following the reporting period. Because these awards were not made until August, the first reports will cover the period from the date of award to September 30 and must be submitted through the EERE PMC website by October 30. Subsequent quarterly progress and financial

reports are due 30 days following the end of the quarters.

Block F of the Federal Assistance Reporting Checklist lists the special ARRA reporting requirements. The first quarterly reports, for the quarter ending September 30, must be entered into the [www.federalreporting.gov](http://www.federalreporting.gov) website by October 10. The first report will cover the period from the date of the award to September 30. Please refer to instructions contained in that website for specific reporting instructions.

Refer to Attachment 3 of the Assistance Agreement. With the exception of the ARRA quarterly reports submitted through [www.federalreporting.gov](http://www.federalreporting.gov) <<http://www.federalreporting.gov>> , all project deliverables and reports should be submitted through the EERE Project Management Center Website: <https://www.eere-pmc.energy.gov/Default.aspx>.

1. From the EERE PMC home page, click on "Recipient Resources"
2. Then, click on "Submit Reporting Requirements"
3. Enter the award number and contact info, and then follow instruction on website.

- Further questions?
- Contact your NASEO regional representative. The list can be found at: <http://www.naseo.org/members/regions/index.html>.
- Contact NASEO Energy Assurance Support at [energyassurance@naseo.org](mailto:energyassurance@naseo.org). Please include you phone number. Jeff Pillon, Chair, NASEO Energy Data and Security Committee, or a NASEO staff person will get back to you as soon as possible via email or telephone.