

**18th Annual
Configuration Management
Benchmarking Group Conference
June 19-22, 2011
Philadelphia, PA**



*Don't take liberties with your
Configuration Management*

Sunday, June 19, 2011		All sessions are in Ballroom D & E unless otherwise noted.	
Reception - Hamilton Room Registration 6:00 p.m. - 7:30 p.m. (Hamilton Room)			
Monday, June 20, 2011		Tuesday, June 21, 2011	
Breakfast (D Foyer)		Breakfast (D Foyer)	
7:00 A.M.	Welcome / Opening / Logistics Paul Davis - PSEG Nuclear	Logistics Paul Davis - PSEG Nuclear	Logistics Paul Davis - PSEG Nuclear
8:00 A.M.	Introductory Remarks and Keynote Paul Davison, VP Operations Support - PSEG Nuclear	Exemplary Margin Management Mike Hayes - Exelon Corporate	CM Challenges with the V-22 Bruce Oestreich, Director - Rotary Craft Systems Engineering & Integration - Boeing Defense, Space and Security
8:15 A.M.	CM and CMBG History Keith Reinsmith - PPL Susquehanna	Digital I&C Systems Configuration Management David Woods - PPL Susquehanna	
8:30 A.M.	ANSI/NIRMA CM 1.0 Revision Rich Giska - NIRMA		
8:45 A.M.	BREAK		
9:00 A.M.	BREAK		
9:15 A.M.	BREAK		
9:30 A.M.	INPO – Engineering Configuration Management Activities Bob Gambrell – INPO	BREAK	BREAK CMBG 2012 Preview Mike Hayes - Exelon
9:45 A.M.		New Build CM from EPC Perspective Bob Renuart - Unistar	
10:00 A.M.	Overview of Updated IAEA Documents SR-65 and TECDOC-1651 Kent Freeland - WorleyParsons	CM Health PIs Lloyd Hancock - LRH Consulting	Panel & Audience Discussion: Conference Wrap Up and Take Aways
10:15 A.M.			
10:30 A.M.	BREAK		
10:45 A.M.	Obsolete Equipment Rob Santoro - PKM	BREAK	
11:00 A.M.		Successes in Transferring Configuration Data from Supplier to Owner/Operator John Whitnire - Bentley Systems, Inc.	
11:15 A.M.	EPR1 Project Status Ken Barry - EPR1		
11:30 A.M.	Lloyd Hancock - LRH Consulting		
11:45 A.M.	LUNCH - (Hamilton Room)	LUNCH - (Hamilton Room)	
12:00 P.M.			Conference Adjourns

Notes:



Steering Committee:

Keith Reinsmith (Chairman) - PPL Susquehanna
 Paul Davis - PSEG Nuclear
 Bobbi Jo Halvorson - Xcel Energy
 Lloyd Hancock - LRH Consulting
 Mike Hayes - Exelon
 Bill Kline - Marathon Consulting Group, Inc.
 John Parler - SCE&G
 Mike Stout - Bentley

2011 Host:

Paul Davis

Admin Staff:

Lori Chapman-Maahs

CMBG Web Master/Google Group:

Paul Davis

Special Thanks to:

The Presenters

The Facilitators

The Steering Committee Members

Lori Chapman-Maahs—Administrative Staff

Paul Davison

Carl Parry—USA

Marline Heathman—USA

PSEG Nuclear Employees:

- Gary Stith— Engineering Services
- Joe Volence—Engineering Services
- Anthony Tramontana—Projects Engineering
- Joe Delmar—Nuclear Communications
- Karen Roots—Nuclear Communications
- Dave DiDonato—Nuclear Communications
- Debby Cheeseman—Business Support
- JoAnn O'Reilly—Procurement
- Robin Campbell—IT
- Mark Creely—Repro
- Molly Russell— Engineering Services Intern
- Alan Ford—Engineering Services Intern

Michael Oca—Sheraton

Carroll Lawson—Sheraton

Gina White—Sheraton

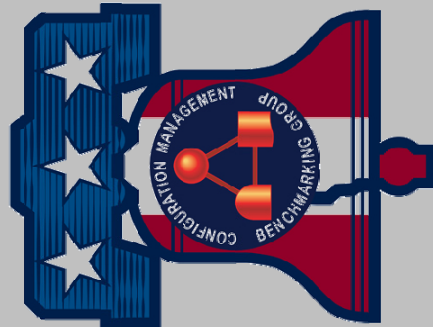
Marion Ryder—the Plough and the Stars

Bill Robling—Ben Franklin

Cyndi Janzen—Betsy Ross

Judy McDonald—4imprint

		Monday, June 20, 2011		Tuesday, June 21, 2011	
1:00 P.M.		TRACK 1 (Existing/Common) Break Out E1 CM 101 Bill Kline - Marathon Consulting Group, Inc. (Ballroom D) Break Out E2 ANST/NIR/MA CM 1.0 Revision Rich Giska (Ballroom E1) Break Out E3 Obsolete Equipment Rob Santoro and Brian Boccardi (Ballroom E2)	TRACK 2 (New Build) Break Out N1 Developing CM Programs for New Build Lloyd Hancock and Gary Ruf (Flower Room)	TRACK 1 (Existing/Common) Break Out E6 Abandoned Equipment Joe Volence (Ballroom E1) Break Out E7 CM Performance Indicators Lloyd Hancock and Jack Shoulders (Ballroom E2) Break Out E11 Digital I&C Systems CM David Woods (Flower Room)	TRACK 2 (New Build) Break Out N4 Fundamental of Maintaining Virtual Plant Information Mike Stout and John Whitmire (Ballroom D) Break Out N5 What are Attributes of a Good CM Practitioner? John Parler (William Penn Board Room)
2:30 P.M.		BREAK		BREAK	
3:00 P.M.		TRACK 1 (Existing/Common) Break Out E4 Drawing Control Mike Stout (Ballroom E1) Break Out E5 Temp Alterations Angie Kozak and John Parler (Ballroom E2)	TRACK 2 (New Build) Break Out N2 Establishing a Common Understanding of CM for New Builds Lloyd Hancock and Bill Kline (Ballroom D) Break Out N3 Incorporating New Builds into Existing Plant Infrastructure Mike Hayes (Flower Room)	TRACK 1 (Existing/Common) Break Out E8 Master Equipment List Bobbi Jo Halvorson (Ballroom E1) Break Out E9 Margin Management Keith Reinsmith (Ballroom D) Break Out E10 Japan Reactor Ramifications Bill Kline & John Parler (Flower Room)	TRACK 2 (New Build) Break Out N6 EPC/Owner Turnover Bob Renaud (Ballroom E2)
4:30 P.M.		End of Conference Activities		End of Conference Activities	
6:00 P.M. to 8:00 P.M.		MONDAY EVENT (The Plough and the Stars Restaurant)		Steering Committee Meeting (William Penn Board Room)	
Admin Support - Lori Chapman-Maahs (William Penn Board Room)					



Don't take liberties with your Configuration Management

Keynote Remarks

Paul Davison - Vice President Operations Support, PSEG Nuclear LLC

About Paul Davison: Paul Davison was named the Vice President of Operations Support for PSEG Nuclear LLC in December 2009. Prior to that, Mr. Davison was the Director of Nuclear Oversight since 2008. He previously served as Site Engineering Director – Hope Creek for over two years. Prior to coming to PSEG Nuclear LLC, he was Site Engineering Director at Exelon Corporation’s Peach Bottom Atomic Power Station in Pennsylvania.

Mr. Davison has over 20 years of nuclear power experience beginning with the Exelon Corporation’s Limerick Generating Station in Pennsylvania. Prior to serving as Site Engineering Director – Peach Bottom Atomic Power Station, a position he held since March of 2000, Davison was Peach Bottom Maintenance Director. Before that he held various management and engineering positions at Exelon Corporation’s Peach Bottom and Limerick Stations. He also served as Design Engineering Manager at Philadelphia Electric Company’s Nuclear Group Headquarters. Paul received a Senior Reactor Operator Certification at the Limerick Station. Paul earned a Bachelor of Science in Engineering from Widener University in Chester, Pennsylvania.

Notes:

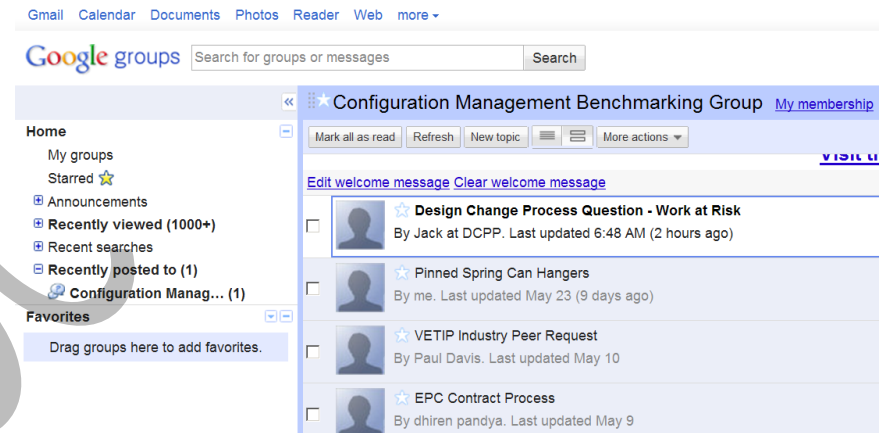


Sign-up:

<http://www.cmbg.org/googlegroup.htm>

Group Web Address:

<https://groups.google.com/forum/#!forum/cmbg-usa>



**Panel & Audience Discussion:
Conference Wrap Up and Takeaways**

Notes:

CM and CMBG History

Keith Reinsmith - PPL Susquehanna (CMBG Chair)

Summary: This presentation will present a chronology and evolution of configuration management as a practice and review the history and role of CMBG in CM.

Notes:

PROQ

ANSI/NIRMA CM 1.0 Revision

Rich Giska - NIRMA

Summary: The NIRMA/ANSI CM Standard has proven to be a cohesive factor for the nuclear industry since it was first issued in 2000. It was revised and re-issued in 2007. Based on the ANSI standard process, the document is scheduled to be reviewed and revised, if necessary, in 2012. This presentation will provide an overview of the standard and prompt discussion for the afternoon breakout session.

Notes:

**Panel & Audience Discussion:
Conference Wrap Up and Takeaways**

Notes:

PROQ

**CMBG 2012 Preview
Mike Hayes - Exelon**

Notes:

INPO – Engineering Configuration Management Activities

Bob Gambrill - INPO

Summary: INPO to present an update of engineering Configuration Management activities.

Notes:

PROQ

Overview of Updated IAEA Documents SR-65 and TECDOC-1651

Kent Freeland - WorleyParsons

Summary: The IAEA has been active at providing CM guidance to nuclear entities outside of the USA. In 2010 they issued two documents: Safety Report 65, "Application of Configuration Management in Nuclear Power Plants" and TECDOC-1651, "Information Technology for Nuclear Power Plant Configuration Management." The presenter will provide an overview of these documents and establish the linkage to current USA CM guidance.

Notes:

CM Challenges with the V-22

Bruce Oestreich - Director - Rotary Craft Systems Engineering & Integration - Boeing Defense, Space and Security

Summary: Configuration Management challenges exist in every industry at every level. An interesting product to consider is the V-22 Osprey – a revolutionary tilt-rotor aircraft currently in production and deployed in Afghanistan and Iraq. The intriguing part of this story is not about the tilt-rotor configuration; but rather how two different companies (Bell Helicopter Textron and The Boeing Company) jointly managed the Configuration of the aircraft with a highly capable Customer (Naval Aviation System Command – NAVAIR) as the acquisition service for the US Marine Corps and US Air Force Special Operations Command end users.

This presentation will relate the basics of what CM actually is; why it remains a simple concept yet so difficult to execute successfully; and some lessons learned from handling multiple configurations for multiple Customers that might resonate within the Nuclear industry.

Notes:

**Track 2—New Build
Break Out N6
EPC/Owner Turnover**

Room: Ballroom E2

Facilitator: Bob Renuart

Summary: This breakout will focus on the details of the turnover process, including how to manage modular construction and partial turn-overs. Breakout participants representing EPCs will be expected to provide examples of CM breakdowns during the project and possible solutions to the problems. Breakout participants representing the Owner/Operator will be asked to identify their expectations from the EPC during the turnover process.

Notes:

Obsolete Equipment

Rob Santoro - PKMJ

Summary: The Nuclear Industry is faced with a growing obsolescence challenge of about 20% of all installed components. This presentation outlines the affects of this increasing challenge to configuration management. Configuration challenges are brought to light in the identification phase of obsolescence. Accurate Master Equipment Lists and Bills of Materials are required to understand the full extent of condition of obsolescence. Finally, when solving these obsolescence challenges, plant changes may be required. This can include Equivalency Evaluations, Design Modifications, and Reverse Engineering. Physical Configuration, Design Requirements, and Documented Configuration may all need to be modified to address these changes.

Notes:

EPRI Project Status

Ken Barry - EPRI

Lloyd Hancock - LRH Consulting

Summary: The presenters will provide the overall status of the project and discuss specifics of the CM Guidance document and the industry AEX/XML integration demonstrations. Specifics of the project's future activities will be addressed. This presentation should prompt discussion for the afternoon breakout sessions.

Notes:

Track 1—Existing/Common

Break Out E10

Japan Reactor Ramifications

Room: Flower Room

Facilitators: Bill Kline and John Parler

Summary: This Breakout is intended to facilitate a forward looking discussion to focus on the possible CM implications of investigations and analyses that result from the industry assessment of the Japan Fukushima Daiichi Plant event. Discussion will use INPO Event Reports (IER) 11-1 and 11-2 recommendations and requested information responses as a starting point to collect and categorize the results submitted by participating INPO members to identify any CM related program or process issues that participants need to take back to their organizations for review and assessment. Participants should be able to discuss what actions are being taken at their utility/organization in response to the Japan event and any CM issues identified in the months since the event.

Notes:

**Track 1—Existing/Common
Break Out E9
Margin Management**

Room: Ballroom D

Facilitator: Keith Reinsmith

Summary: The breakout will quantify the attributes of a successful Margin Management program. Mike Hayes of Exelon will be available to provide more details of Exelon's Margin Management program and answer any specific questions the breakout participants may have.

Notes:

**Track 1—Existing/Common
Break Out E1
CM 101**

Room: Ballroom D

Instructor: Bill Kline

Summary This session would be based on a 45-60 minute PowerPoint presentation that walks the audience through the fundamental concepts, terms, and examples of Configuration Management (CM), including design and operating margin management. The objective of this breakout is to attract new conference attendees to the configuration management process and provide them with a capsule summary of the workings of the CM process to provide an understanding of how the different plant organizations contribute to and support configuration control of our design, processes, and equipment. The instructor will discuss the industry three ball process model for configuration management, the five functional areas of CM, and using CM to protect design and operating margins.

Notes:

**Track 1—Existing/Common
Break Out E2
ANSI/NIRMA CM 1.0 Revision**

Room: Ballroom E1

Facilitator: Rich Giska

Summary: The breakout will review the standard and discuss its industry role and relationship to other CM guidance documents. Participants for the breakout will be expected to ask specific questions about the standard or provide input to the possible revision.

Notes:

**Track 1—Existing/Common
Break Out E8
Master Equipment List**

Room: Ballroom E1

Facilitator: Bobbi Jo Halvorson

Summary: This breakout session is intended to provide discussion on basic CM concepts. It is intended to help attendees share information about the development, maintenance and use of equipment databases. Attendees will be asked to describe their organizations approach to data integrity and 'ownership' of the database, as well as its uses. This will include sharing of information about audit results and feedback from INPO and the NRC.

Notes:

Track 1—Existing/Common

Break Out N5

What are Attributes of a Good CM Practitioner?

Room: William Penn Board Room

Facilitator: John Parler

Summary: Issuance of industry CM guidance documents is predicated on the assumption that the reader has a basic understanding of CM fundamentals and some familiarity with good CM principles and practices. These are two of the attributes that will be discussed in this breakout. Other attributes will be identified and discussed. Coming out of this breakout, the CM Practitioner attributes can be posted on the CMBG webpage to serve as a barometer and possible improvement path for interested Practitioners.

Notes:

Track 1—Existing/Common

Break Out E3

Obsolete Equipment

Room: Ballroom E2

Facilitators: Rob Santoro and Brian Boccardi

Summary: The focus of this breakout session is to further explore the areas and situations where obsolescence may impact configuration management. By understanding these impact areas, Sites can be better prepared to address the potential issues that may result. The breakout session will also include a discussion on strategies to minimize the obsolescence impact, including proactive approaches.

Notes:

Track 2—New Build

New Build

Break Out N1

Developing CM Programs for New Build

Room: Flower Room

Facilitators: Lloyd Hancock and Gary Ruf

Summary: This breakout will expand on the morning presentation by EPRI. Specific suggestions will be offered for building a robust CM Program from the ground up. The participants will have an opportunity to ask questions, collect information and comment on lessons learned. The breakout material will also be useful to an existing plant needing to upgrade or overhaul its CM Program.

Notes:

Track 2—New Build

Break Out N4

Fundamentals of Maintaining Virtual Plant Information

Room: Ballroom D

Facilitators: Mike Stout and John Whitmire

Summary: This breakout will review the “Virtual Plant” concept and contrast it to the past document-centric methods of maintaining information. The breakout participants will identify the potential barriers in maintaining information in the virtual plant arena and will propose solutions that can be used to address the barriers.

Notes:

Track 1—Existing/Common

Break Out E11

Digital I&C Systems Configuration Management

Room: Flower Room

Facilitator: Dave Woods

Summary: The proliferation of diverse digital I&C equipment for plant upgrades and equipment replacements has challenged station personnel to develop and implement effective configuration management methods. High level requirements and guidance provided by industry standards are not being effectively translated into practical methods to manage the configuration of digital I&C equipment.

Notes:

Track 1—Existing/Common

Break Out E4

Drawing Control

Room: Ballroom E1

Facilitator: Mike Stout

Summary: A session around basic CM principles associated with classifying, controlling and maintaining plant drawings. Industry guidelines and good practices will be shared.

Notes:

**Track 1—Existing/Common
Break Out E5
Temp Alterations**

Room: Ballroom E2

Facilitators: Angie Kozak and John Parler

Summary: Proper management of temporary alterations is vital to facility configuration management. This break out session will focus on the various aspects of temporary alterations including terminology, the criteria for deciding the proper change mechanism, i.e., full engineering controls, procedure controlled, maintenance support, pre-engineered alterations, etc. Attendee's should be prepared to discuss how their plant manages temporary alterations, problems related to the removal of temporary alterations, site measures used to monitor temporary alterations, and any problems related to the overdue removal of temporary alterations.

Notes:

**Track 1—Existing/Common
Break Out E7
CM Performance Indicators**

Room: Ballroom E2

Facilitator: Lloyd Hancock and Jack Shoulders

Summary: The breakout will review the results of the industry survey and give the breakout participants an opportunity to ask questions or offer opinions. Hopefully coming out of the breakout will be a consistent set of CM Performance Indicators that can be published on the CMBG website.

Notes:

Track 1—Existing/Common

Break Out E6

Abandoned Equipment

Room: Ballroom E1

Facilitator: Joe Volence

Summary: This breakout addresses the fundamental elements and differences between the Permanent and Interim Abandonment processes.

Interim Abandonment is offered up as an interim, less expensive alternative to Permanent Abandonment using Design Changes when such Design Changes score low with Plant Health Committees in the competition for limited plant finances.

Consider the advantages and disadvantages of these two processes in terms of resources, schedule, implementation, configuration control and physical end product.

Notes:

Track 2—New Build

Break Out N2

Establishing a Common Understanding of CM for New Builds

Room: Ballroom D

Facilitators: Lloyd Hancock and Bill Kline

Summary: The need to communicate CM principles and practices to all participants of a New Build project is necessary to ensure short and long term success. With the highly interactive climate brought about by new licensing methods and current technology, the need to understand each participant's role is increased. It is necessary to know the up-stream and downstream hand-offs to appreciate the product being delivered. The breakout will cover techniques and practical solutions to providing the needed common understanding.

Notes:

Track 2—New Build

Break Out N3

Incorporating New Builds into Existing Plant Infrastructure

Room: Flower Room

Facilitator: Mike Hayes

Summary: The fact that no stand-alone nuclear plants are currently planned presents today's Owner/Operators with some unique challenges. Do they try to meld the new plant(s) into the existing infrastructure? Will existing procedures be modified to address the new plant or will all new procedures be written? Will the existing SSC numbering conventions be used? Will the Enterprise Asset Management system be expanded to cover the new plant?

Notes:

Successes in Transferring Configuration Data from Supplier to Owner/Operator

John Whitmire - Bentley Systems, Inc.

Summary: The presenter will describe successes in techniques used to transfer configuration information from supplier to owner/operator in other industries. Challenges to the data transfer will be identified and the solutions employed to overcome them will be explained. The presentation will provide an overview of the data transfer process and will prompt discussion in the afternoon breakout for how these processes could be adapted to nuclear plant information.

Notes:

CM Health PIs**Lloyd Hancock** - LRH Consulting

Summary: The presenter will review the CMBG efforts to quantify a consistent set of CM Performance Indicators. Results of an industry questionnaire asking for specific indicator values will be presented. This presentation will provide an overview of the CM Performance Indicators and prompt discussion for the afternoon breakout session.

Notes:

Exemplary Margin Management**Mike Hayes** - Exelon

Summary: Margin management has been a hot topic at the CMBG Conference in the past few years. Feedback from last year's conference expressed the desire to see an example of a successful margin management program. INPO has identified Exelon as having such a program. This presentation will provide an overview of the Exelon Margin Management program and should prompt discussion for the afternoon breakout session.

Notes:

Digital I&C Systems Configuration Management

Dave Woods - PPL Susquehanna

Summary: The proliferation of diverse digital I&C equipment for plant upgrades and equipment replacements has challenged station personnel to develop and implement effective configuration management methods. High level requirements and guidance provided by industry standards are not being effectively translated into practical methods to manage the configuration of digital I&C equipment. This presentation will discuss a current EPRI project to develop a methodology and guidelines to assist station personnel to implement effective configuration management processes and procedures for various types of digital systems and components. This guidance will be based on practical, best industry practices, compliant with industry and regulatory requirements.

Notes:

New Build CM from EPC Perspective

Bob Renuart - Unistar

Summary: This presentation will provide the management of CM from the Engineering, Procurement and Construction (EPC) perspective. The topics will consist of:
CM lessons learned from existing plants, the impact of problems created by breakdowns of CM principles outside of EPC involvement, the need for consistent terminology and understanding of CM by all project participants, and suggestions for improving CM from the EPC perspective.

Notes: