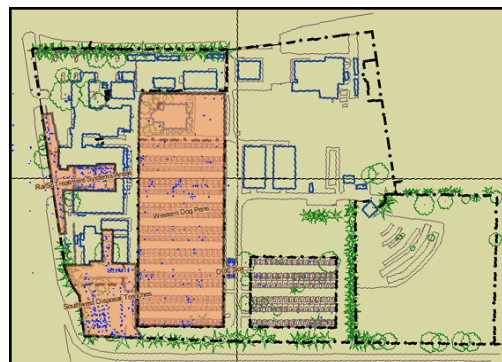


How LandTrek Closure Checklists helped LEHR closure activities

Introduction:

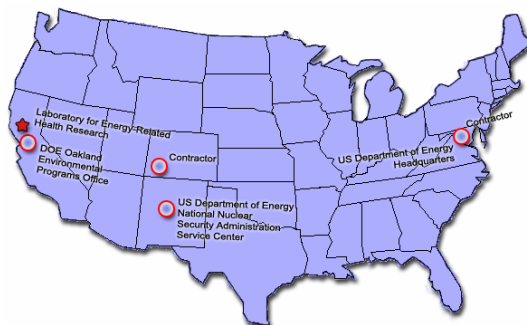
The Laboratory for Energy-Related Health Research (LEHR) is located northeast of San Francisco near Davis, California. U.S. Department of Energy (DOE) began restoration at LEHR in 1988 and is currently engaged in closure activities. DOE's activities at LEHR are limited to cleaning up contamination at six DOE areas in compliance with the CERCLA requirements and the terms and conditions of the Federal Facility Agreement (FFA) signed by DOE, EPA and State Environmental Agencies in 1999. The LEHR Closure Team used LandTrek's online collaborative checklist tool to assist in managing, tracking and meeting these requirements.



Laboratory for Energy-Related Health Research

Checklists benefited LEHR during Readiness Review:

The LEHR Transition Team conducted Readiness Review collaboratively with more than 15 people in DOE/Contractor offices all across the country. It was completed in “5 hours — comparable to the flying time between Washington and San Francisco.” The online tool saved tens of thousands of dollars and eliminated travel expenses by conducting the entire review “virtually” over a conference call.



Closure Team spans across Country

With the online checklists as a focal point, the team members discussed, collaborated and commented on LEHR's closure readiness. Participants asked questions and in real time, modified the progress and status of the requirement milestones. Following the review, the team had printable documentation.

Team found using Closure Checklists to be uncomplicated:

LEHR subject matter experts and a DOE specialist familiar with CERCLA requirements created “CERCLA Closure Requirements/Status for DOE Areas” using the available CERCLA template. Action items and important compliance milestones were easily added to the system using a simple form. Editing and formatting were done with tools similar to those used in the past with Microsoft Word. Within days, both Removal Actions and Remedial Actions were clearly documented in a checklist called “CERCLA Closure Requirements/Status for DOE Areas.” The authors added a contextual introduction and specified the expected completion date for each line item.



Details of Closure Action Item

Managers benefited from Closure Checklists

Department of Energy managers relied on the Closure Checklist executive summary to quickly ascertain the status of compliance items. One manager used this high-level report to passively track progress on LEHR’s path to closure without burdening field staff with periodic inquiries. The executive summary report can be sorted by completion date, effectively creating a prioritized to-do list. Color coding focuses attention to both past and approaching deadlines.

- Completed, transferred or deleted
- Scheduled for completion within 30 days
- Scheduled completion date has passed



Executive Summary Report

Managers could export snap-shot reports in PDF format for archival purposes or for official deliverables to Department-of-Energy Headquarters. With these formal reports, compliance progress was shared with high-level managers without requiring them to access the system.

Closure Checklists are a team activity:

Online checklists facilitated collaboration throughout the closure process; however, it was critical that only specific team members were allowed to view and contribute data. At LEHR, participants were authorized only for pertinent and applicable processes. Authors had full control to create, edit and delete action items, while others were allowed only to view progress and to provide comments using the online-commenting tool.

A more detailed checklist report enabled users to add files and links as well as comments, providing background information to the individual tasks or group of tasks. Team members could comment on each other’s work and provide context and clarification inline with the action items. They updated the checklists following their own progress towards completion. Having the checklists online allowed stakeholders of the site to view closure progress. Utilizing the checklist ensured that all parties involved were aware of task completion dates or items which were overdue.

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