

## Lumping and Splitting

Below is guidance on dealing with the challenge of what we call “lumping and splitting” work elements. Because project management is a dynamic discipline, lumping and splitting guidance can't be written in a discrete step-by-step format. This material is a starting point – it introduces the basic concepts we use in the Fish and Wildlife program. Contractors and BPA project managers should discuss their specific project needs, and determine how best to lump or split the work elements they've chosen to describe their project work.

- NOTE: For some work elements, there are rules about whether you can lump or split, so be sure to check the appropriate work element background pages for the work elements you are using. Detailed information about individual work elements is available on the work element web pages at <http://www.efw.bpa.gov/contractors/statementsofwork.aspx>.

Our approach is to focus on those areas where BPA has specific requirements for how projects are organized, while intentionally leaving other aspects up to the contractor and BPA project manager. The goal is to achieve consistency where needed, and flexibility where it counts.

## Two Lumping And Splitting Stories

Below are “stories” that describe lumping and splitting challenges that are common across work elements. The stories do not contain guidance specific to an individual work element. For work element specific guidance see the work element web pages at <http://www.efw.bpa.gov/contractors/statementsofwork.aspx>. Often, lumping or splitting is up to the contractor, but sometimes, in order to collect metrics information, you'll have to split work into separate work elements.

Two lumping and splitting stories are possible. They are:

- *“You Can Lump Those.”*
- *“You Have to Split Those.”*

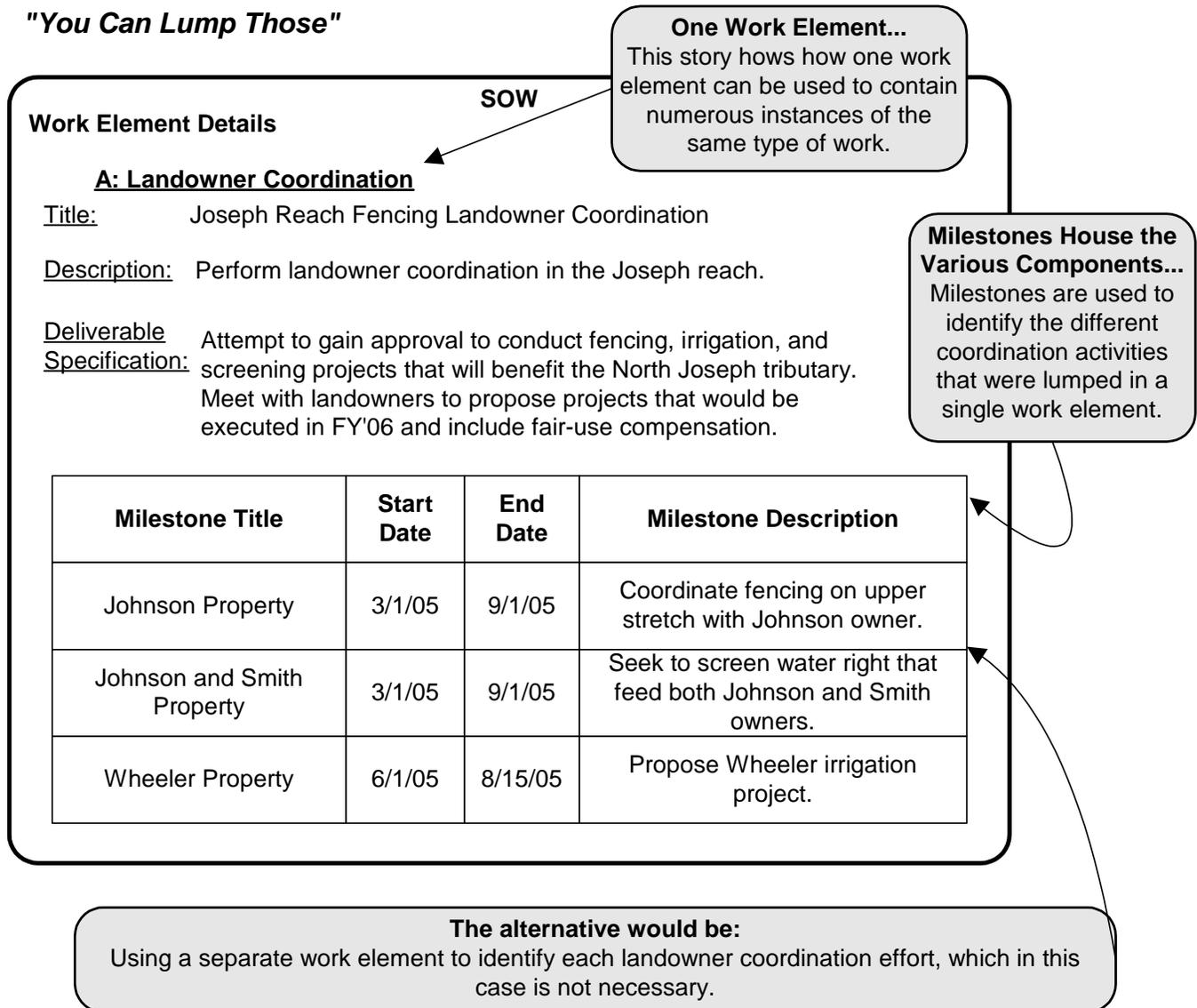
In each case, the information you can find on the work element pages – the work element definition, rules, and examples – will guide you in what stories need to be applied. However, it will be helpful to understand the stories in general, as they are presented below.

## "You Can Lump Those"

If you have more than one activity of the same type of work in a single contract, you should consider the *You Can Lump Those* story.

This story allows multiple instances of the same work to be lumped in one work element.

For example, performing landowner coordination with multiple landowners at multiple locations can all be described by a single work element. For example:



The alternative to "You Can Lump Those" is splitting similar items into their own work elements. Such is required by the *You Have to Split Those* story.

## “You Have to Split Those”

If you have more than one activity of the same type of work in a single contract, you may be required to consider the *You Have to Split Those* story.

### Reasons For Lumping And Splitting Are:

*Patterns that guide general project organization, intended to enable higher level programmatic tracking.*

<b>General Organization</b>	①	<b>O&amp;M</b>	Define O&M work in a separate work element.
	②	<b>Environmental Compliance</b>	Define environmental compliance work in a separate work element.
	③	<b>Major Project Phase</b>	Define work that constitutes a major project phase, such as design, in separate work elements, if of appropriate magnitude.
	④	<b>Separate External Contracts</b>	Define work that is accomplished by different contracts using separate work elements.
	⑤	<b>Separate Internal Contracts</b>	Define work that is accomplished by different internal BPA departments, such as TBL and Legal, using separate work elements.

*Patterns that ensure projects are set-up in a manner that allows the capture of biological metrics.*

<b>Metrics</b>	⑥	<b>Biological Strategies and Metrics</b>	Separate work in a fashion consistent with how metrics will be collected.
	⑦	<b>Location</b>	Separate actions that you wish to track the location of individually.

*Patterns that deliver flexibility for work to be organized in a manner that suits individual projects and contracts well.*

<b>Project Management</b>	⑧	<b>Project Management</b>	Isolate those actions for which the PM wants to identify the scope, budget, timeline, or status separately.
	⑨	<b>Sub Contractor</b>	Isolate work elements if there is a desire to more clearly identify the work of a sub-contractor.