Grid Mod Portfolio Close Out Plan

09.28.2022



Agenda



- Purpose
- Context
- Considerations
- Roadmap
- Mobilization Chart
- Steps to Closing Individual Projects
- Steps to Closing Grid Mod Portfolio
- Key Takeaways
- Close Out Timeline
- Knowledge Transfer

Purpose



Provide overview of GM Portfolio Close Out Plan

Gain support from Executive Sponsors and project teams

Prepare for transfer of ownership and closure of projects

Context

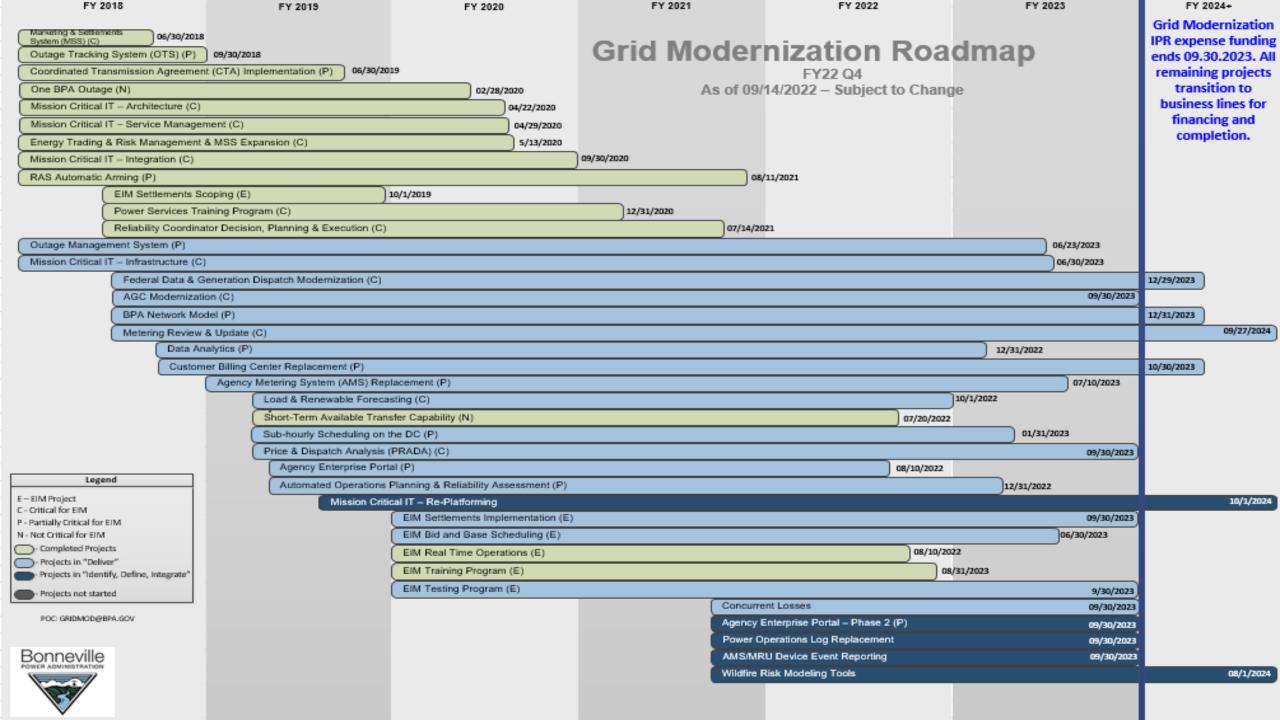


- As of October 1, 2023:
 - Grid Mod expense funding ends
 - BTO Project Management support stops
 - Program Managers, Business Analysts, Change Managers;
 - Portfolio Manager Permanent position (currently filled with detail);
 - EIM Program Manager Temporary authorized position NTE 9.30.2023 (currently filled with detail);
 - GM Director Temporary authorized position NTE 9.30.2023 (currently filled with detail)
 - GEM Subcommittee sunsets (when appropriate)

Considerations



- Timeline (1 year out):
 - Projects scheduled to close out under GEM Subcommittee oversight
 - Provide quarterly update to GEM
 - Additional BTO support (as available)
 - TT/J Prioritization
 - FY24+ projects move to business lines
 - Governance
 - Expense dollar funding
 - Cross agency support
 - TT/J Prioritization
 - Capital Process
- Internal and external communication goals
 - Oversight of change management
- Properly close out portfolio
 - Knowledge Transfer
- Close out report
 - Communications Plan



Grid Modernization Mobilization

GRID Modernization

Updated: 09.20.2022 Date = Completion Date

46%

Agency Enterprise Portal - 08.10.2022

AGC Modernization - 09.30.2023

AMS Replacement - 07.10.2023

AOP & Reliability Assessment – 12.31.2022

BPA Netw ork Model - 12.31.2023

CBC Replacement - 10.30.2023

Concurrent Losses - 09.30.2023

Data Analytics – 12.31.2022

EIM Bid & Base Scheduling - 06.30.2023

EIM Settlements Implementation - 09.30.2023

EIM Testing Program - 09.30.3023

FDGDM - 12.29.2023

Load & Renewable Forecasting – 10.01.2022

Metering Review & Update - 09.27.2024

MCIT - Infrastructure - 06.30.2023

Outage Management System - 06.23.2023

PRADA - 09.30.2023

Sub-Hourly Scheduling on the DC -01.31.2023

8%

AMS MRU Device Event Reporting – 09.30.2023 Pow er Ops Log Replacement – 09.30.2023 MCIT – Re-Platforming – 10.01.2024 5%

Agency Enterprise Portal Phase 2 – 10.30.2023 Wildfire Risk Modeling – 08.01.2024

U%

Identify Define

Integrate

Deliver

41%

CTA Implementation - 06.30.2019

EIM Real Time Operations - 08.10.2022

EIM Settlements Scoping - 10.01.2019

EIM Training Program - 08.31.2022

ETRM & MMS Expansion - 05.13.2020

Marketing & Settlements System - 06.30.2018

MCIT - Architecture - 04.22.2020

MCIT - Integration - 09.30.2020

MCIT - Service Management - 04.29.2020

One BPA Outage - 02.28.2020

Outage Tracking System - 09.30.2018

Pow er Services Training - 12.31.2020

RAS Automatic Arming - 08.11.2021

RC Decision, Planning & Exec. - 07.14.2021

ST Available Transfer Capability - 07.20.2022

Complete

Real Time Ops Modernization - 09.14.2022

Deferred

Close Out Steps per IDID process



Sharing for awareness – this process is standardized

Prepare to Complete Executive Sponsor

Deliver to Complete
 Powerpoint Template
 is prepared by
 Project Team and
 BTO PM

Transfer of
 Ownership Checklist
 is verified and signed
 by Executive Sponsor
 of Project,
 VP/Director of
 Receiving Business
 Unit, TT Director/CIO
 for J for prioritization,
 and TP VP for capital
 process.

- Deliver to Complete
 Checklist
 is approved by Grid
 Mod Director
- Move to Complete briefing requires GEM Approval
- Update Action and Decision Log

- Project Closeout
 Checklist
 is approved by Grid
 Mod Director
- Schedule Project
 Closeout presentation
 to GEM within 90 days
- Final Closeout Brief to GEM

Steps to Closing Grid Mod Portfolio



As projects are closed, it is necessary to close out Grid Modernization as a program. The BTO will lead the GEM through the program close out throughout FY23. Program close out will include:

- Analyze portfolio performance analysis
- Obtain stakeholder approval for closure
- Execute transition/close-out or portfolio and constituent projects
- Conduct post-review meeting for lessons learned
- Report lessons learned and best practices for organizational improvement
- Archive documents for repository and preparation for internal audit
- Recognition of project teams successes
- Adopt and operationalize Lessons Learned for future initiatives
- Publish GM Close Out Report

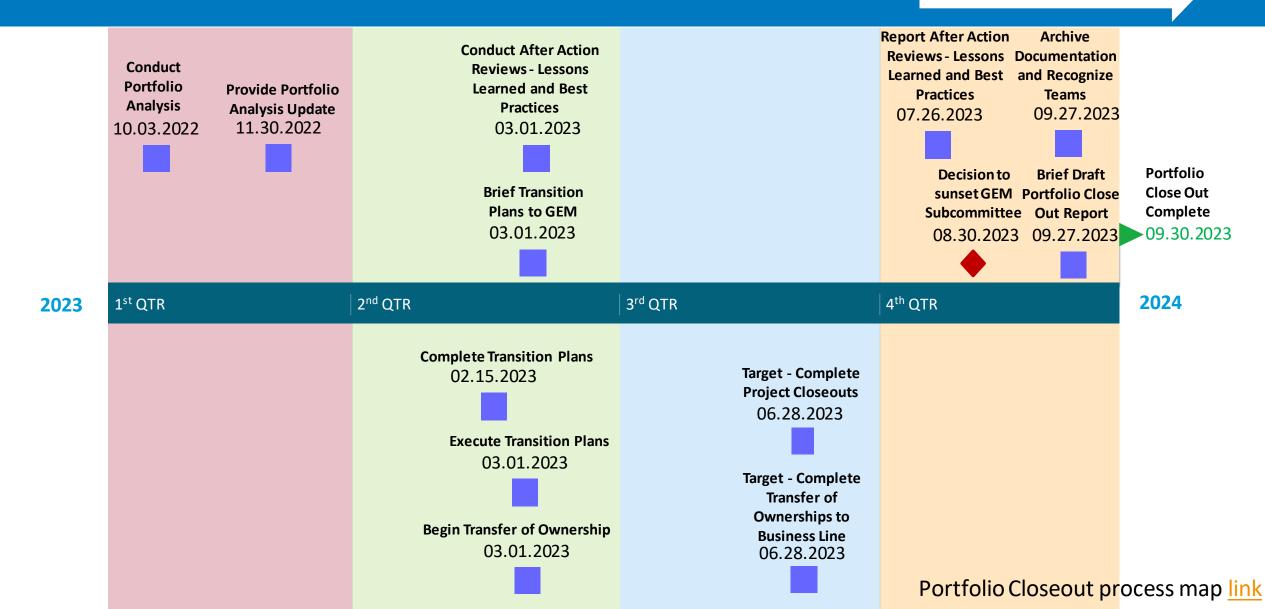
Key Takeaways

By end of FY23,

- 1. Projects will complete or transfer to a business line, per individual project plans
- 2. Those projects requiring resources in FY24 and beyond will shift to business line *prioritization* for resources (staffing, funding, oversight)
- 3. Decision made on GEM Subcommittee (sunset when appropriate once sunsetted, there will be no cross agency decision forum)

GM Portfolio Close Out Timeline

GRID Modernization



Knowledge Transfer



- Purpose: Transition of duties and responsibilities from BTO and contract staff to BPA staff in business lines
- Process to ensure mission assurance:
 - Identifying the work that the BTO staff, MSC and CFTE are currently doing (EIM Program Management team by mid September)
 - Identifying the relevant BPA positions that would need to undertake the work (EIM Program Management team by early October)
 - Codify work in the performance plan and in position description if appropriate (Impacted Supervisor by late October)
 - Where necessary, this may include a new position, new PD and/or hiring action
 - Mentoring and/or cross training the occupant of the business line position (BTO staff, MSC and CFTE by late February)
 - Validate that the occupant of the business line position can perform the assigned work to standard (Impacted Supervisor by mid March)

GRID Modernization

Questions?