ONTARIO POWER GENERATION

Manual

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Title:
PROJECT COMMUNICATION AND STAKEHOLDER MANAGEMENT

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PROJECT COMMUNICATION AND STAKEHOLDER MANAGEMENT

OPG-MAN-00120-0017-NA-R001

2020-09-01

Project ID: N/A

Internal Use Only

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Revision Summary

Revision Number	Date	Comments
R001	2019-03-26	Initial issue.
R001	2020-09-01	Changed references from RMO to ePMX throughout Section 2.1.2.3: Updated Table 1 of minimum project communication requirements Section 5.2: Updated list of abbreviations and acronyms Appendix B: Updated automated report examples Appendix C: Updated project records table Appendix D: Updated IDB diagram

1.0 DIRECTION

In each project, communication develops the relationship necessary for successful project outcomes. In the context of successfully managing project relationships with stakeholders, communication includes developing strategies and plans for suitable communications artifacts and activities with the stakeholder community. Every project has stakeholders who are impacted by or can impact the project in a positive or negative way, and effective communication and stakeholdering is part of effective project change management. To increase the chances of project success, the process of stakeholder identification and engagement should commence early in the project life cycle.

This document receives authority from Project Management standard [R1] and is a component of the overall Enterprise Project Management governance framework. The Enterprise Project Management governance is applicable to all projects planned and executed within OPG.

This document utilizes principles included in the Managing Change [R2] standard which provides requirements for OPG business units for managing changes resulting from projects or initiatives.

Each project needs to fulfil the specific communication and stakeholder management requirements for the different project levels as defined in the Scalable Project Delivery Model [R3]. This includes the use of established Project Management Information Systems (PMIS) tools and software for managing related project work.

> The Scalable Project Delivery Model [R3] provides a scaled application of project management principles and processes reflective of a projects complexity and cost. The model provides the minimum requirements for a project by knowledge area. It is expected that Project Managers will apply the intent of the knowledge area and exceed the minimum requirements as appropriate. The Business Unit Execution Line Management and/or Project Management Office may define additional requirements based on the specific project and portfolio requirements.

All project information and documentation that does not exist within PMIS should be maintained and stored within SharePoint in a standardized project working folder structure. Related project records and controlled documents should be managed in accordance with section 3.0 of this manual. See Appendix D for a list of project documents and records management.

Note: ***Strategic Projects and/or Programs*** may have additional or varied expectations or requirements for projects within the program, and for the overall program itself. These should be documented in a project controls plan (or equivalent) for the program.

1.1 Overview

Project communication management includes the processes to ensure that information needs of the project and its stakeholders are met through development of artifacts and implementation of activities designed to achieve effective information exchange. Project stakeholder management includes the processes required to identify the people, groups,

or organizations that could impact or be impacted by the project, to analyze stakeholder expectations and their impact on the project, and to develop appropriate management strategies for effectively engaging stakeholders in project decisions and execution.

The Project Communication Management processes are:

- Plan Communication Management (Section 2.1.1)
- Manage Communications (Section 2.1.2)
- Monitor Communications (Section 2.1.3)

The Project Stakeholder Management processes are:

- Identify Stakeholders (Section 2.2.1)
- Plan, Manage and Monitor Stakeholders Engagement (Section 2.2.2)

Desktop guides and templates associated with this manual are available on the Enterprise Project Management website.

2.0 PROCESSES

2.1 Project Communication Management Processes

2.1.1 Plan Communication Management

Plan Communication Management is the process of developing an appropriate approach and plan for project communication activities based on the information needs of each stakeholder or group, available organized assets, and the needs of the project. It incorporates elements of change management to ensure stakeholders can successfully adopt and sustain the change post project completion. The key benefit of this process is a documented approach to effectively and efficiently engage stakeholders by presenting relevant information in a timely manner.

While projects share the need to communicate project information, the information needs, methods of distribution, and amount of information may vary widely. In addition, the methods of storage, retrieval, and ultimately disposition of the project information need to be considered and documented during this process.

2.1.1.1 The project communication management plan should be included within the Project Management Plan (PMP) as per the Project Integration Management [R4] manual, and assessed periodically throughout the project as needed. Details on the Stakeholder Register and Communication Plan template and content are provided in Appendix A.

2.1.1.2 The level of detail within the project communication plan should be reflective of the cost, complexity and overall risk of the project (i.e. should consider the project level), and should be revisited throughout the life cycle of the project as stakeholders and requirements change. The communication plan should consider:

(a) The established tools, systems and processes for project management including EcoSys, Primavera P6, and the month end process.

(b) The standardized internal communication channels and reporting requirements aligned to the Scalable Project Delivery Model [R3].

(c) Stakeholder information and communication requirements, risk thresholds, etc.

(d) Project organization and stakeholder responsibilities, relationships, and interdependencies.

(e) Logistics of how many persons and at which locations.

(f) Internal (within the organization) and external (contractors, public etc.) information needs.

(g) Legal, regulatory, and commercial sensitivity requirements.

(h) Escalation processes.

2.1.1.3 The project communication plan should support the communication requirements as defined in the *Integrated Reporting Plan* [Appendix B].

The *Integrated Reporting Plan (IRP)* defines the reporting structure and flow of project performance information throughout all levels of the organization, from the project teams to the Board of Directors. The IRP supports timely and effective insight-driven decision making at the appropriate level of the organization; and facilitates program and portfolio reporting.

2.1.1.4 For high impact changes, the communication plan should include strategies and actions to evaluate, reinforce and sustain the change and desired behaviours throughout the project life cycle and post project completion. Strategies may include: monitoring short-term results to collect early feedback, self-assessment (e.g. 6 months and 1 year after change), course correcting if necessary, and recognizing and reinforcing positive behaviour and progress.

2.1.2 Manage Communications

Manage Communication is the process of ensuring timely and appropriate collection, creation, distribution, storage, retrieval, management, monitoring and ultimate disposition of project information. The key benefit of this process is that it enables an efficient and effective information flow between the project team and the stakeholders. This process is performed throughout the project.

2.1.2.1 Standardized project communications should be prepared using the pre-established template in accordance with the Scalable Project Delivery Model [R3] and distributed as per the Project Management Month End Process defined in Project Integration Management manual [R4]. This process includes data entry into the PMIS, analysis and internal review, and final publication and distribution of performance reports.

2.1.2.2 Standardized project performance reports are stored in the PMIS and historical records can be retrieved through the reporting site.

2.1.2.3 At a minimum, all projects shall document the project performance in a monthly project performance report as per the Scalable Project Delivery Model [R3]. These reports shall be prepared in the standardized template based on project level. The standard reports are provided in Table 1.

Table 1: Minimum standardized project communication requirements based on project level.

Report	Stakeholders / Influence & Impact	Key Messages/ Information	Frequency	Owner(s)
All project levels -				
Included in Portfolio Report – Submitted to records monthly via portfolio submission.	Leadership Team – Consult	High level status of project performance and forecasts in the areas of safety, quality, cost, schedule and risk.	Monthly (as per standardized month end (ME) process)	Project Manager
Vendor Performance Package. Stored in Project Working Folder	Project Team - Collaborate	Details on project performance as reported by the vendor.	Minimum Monthly (in support of ME)	Vendor
Project level A, B and C				
Project Dashboard. Stored in PMIS	Business Unit Executing Director – Consult	Summary of project performance in the areas of safety, quality, cost, schedule and risk. Includes Earned Value, performance curves, and variance analysis]	Monthly (as per standardized month end (ME) process)	Project Manager
Project level A				
AS REQUESTED BY BU LINE OR SPONSOR **Written Project Status Report.** Submitted to records monthly	Business Unit Executing Director - Consult	Detailed assessment on project status areas of safety, quality, cost, schedule and risk. Includes details on performance over the period and forecast for next period.	Monthly (as per standardized ME process)	Project Manager

Note: Standardized report templates are provided on the Enterprise Project Management website.

2.1.2.4 Information within PMIS should be accurate, reflect the status and performance of the project, and retrievable. Data should be validated by the project team frequently to enable timely, and effective decisions based on relevant and correct information.

2.1.2.5 Project performance analysis and variance explanations should be completed as per the required timeline, with the required quality and confirmed by the project manager. Variance explanations should identify (1) the variance; (2) cause of the variance; (3)

impact of the variance on project objectives (e.g. scope, cost and schedule); and (4) corrective actions and timelines for recovery.

2.1.2.6 Project performance reports should be reviewed by the Business Unit Line Management and Sponsor in accordance with business unit project performance review processes.

2.1.3 Monitor Communications

Monitor Communications is the process of ensuring the information needs of the project and its stakeholders are met, and confirming that the desired effect of increasing or maintaining stakeholders' support for the project deliverables and expected outcomes are achieved. The key benefit of this process is the optimal information flow as defined in the communication management plan and stakeholder engagement plan. This process is performed throughout the project.

2.1.3.1 The project manager should review stakeholder communication effectiveness periodically. This may result in the adjustment, action and intervention on communication activities defined in the communication management plan.

2.2 Project Stakeholder Management Processes

2.2.1 Identify Stakeholders

The process of periodically identifying project stakeholders and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success. The key benefit of this process is that it enables the project team to identify the appropriate focus for engagement of each stakeholder. The ability of the project manager and team to correctly identify and engage all stakeholders in an appropriate way can mean the difference between project success and failure.

2.2.1.1 Stakeholder analysis should start as soon as possible after the project charter has been approved, project manager assigned and the project team begins to form.

2.2.1.2 Stakeholder analysis should be performed to define stakeholder expectations, attitude (their levels of support for the project), and their interest in information about the project. Stakeholders' stakes can include but are not limited to interest, rights, ownership, knowledge, and contribution.

2.2.1.3 The Stakeholder Management Plan including the Stakeholder Register and Communication Plan, should be documented within the Project Management Plan (PMP) as per Project Integration Management [R4]. Refer to Appendix A for guidance on stakeholder and communication management planning.

2.2.2 Plan, Manage and Monitor Stakeholder Engagement

Plan Stakeholder Engagement is the process of developing approaches to involve project stakeholders based on their needs, expectations, interests and potential impact on the project. Planning stakeholder engagement is a key component of change management. The key benefit is that it provides an actionable plan to interact effectively with stakeholders.

Manage Stakeholder Engagement is the process of communicating and working with stakeholders to meet their needs and expectations, address issues, and foster

appropriate stakeholder engagement. The key benefit of this process is that allows the project manager to increase support and minimize resistance from stakeholders.

Monitor Stakeholder Engagement is the process of monitoring project stakeholder relationships and tailoring strategies for engaging stakeholders through the modification of engagement strategies and plans. The key benefit of this process is that it maintains or increases the efficiency and effectiveness of stakeholder engagement activities as the project evolves and its environment changes.

2.2.2.1 The stakeholder engagement plan should identify the strategies and actions required to promote productive involvement of stakeholders in decision making and execution.

2.2.2.2 Stakeholder engagement should occur throughout the life cycle of the project to obtain, confirm, or maintain their continued commitment to the success of the project.

2.2.2.3 The project manager should review stakeholder engagement effectiveness periodically and this may result in the adjustment, action and intervention on communication activities defined in the communication management plan.

2.3 Project Data Management and Standardized Performance Reporting

2.3.1 Project Data Management

Throughout the life cycle of a project, a significant amount of data is generated. This data is collected, analyzed, aggregated and transformed to provide insights to drive appropriate decision making. The PMIS provides integrated project information and facilitates the automation of data collection, analysis and use.

2.3.1.1 Key project performance information should be entered, transformed and stored within the PMIS [Appendix E] providing accurate, timely and auditable data.

2.3.1.2 Data within the PMIS is governed by the suite of Enterprise Project Management Manuals including Project Integrated Change Control [R5].

2.3.1.3 The confidentiality, integrity, availability and retention of project information is controlled within the approved data systems in accordance with the Records and Document Management [R6] and Section 3.0.

2.3.2 Standardized Project Performance Reporting

Standardized project performance reporting refers to the consistent set of reports that are required to be produced by the project teams on a pre-determined frequency to satisfy the overall project and portfolio management requirements. The primary objective of standardized project performance reporting is to provide consistent, accurate and timely insight into project status in order to enable effective decisions and improve project performance.

2.3.2.1 Standardized project performance reports should be established by the enterprise Project Management Office based on industry best practice. Standardized reporting examples are provided in Appendix C.

2.3.2.2 The standardized project performance reports should be largely electronic utilizing source system information. This increases the quality of the information and provides auditability and transparency.

2.3.2.3 The standardized report format should be reviewed periodically to ensure that stakeholder needs are being met, and that any benchmarking or lessons learned are incorporated.

3.0 DOCUMENT MANAGEMENT

3.1 Project Management Records and/or Controlled Documents

During the project life cycle, the project team collects a multitude of project documents and correspondence. The creation and management of accurate and reliable project records and/or controlled documents enables the project to function efficiently and effectively. The project manager is accountable for their project's business decisions and transactions and must be able to provide evidence of activities performed to meet internal and external stakeholder expectations.

3.1.1 Project Management records may be generated by use of the suite of enterprise project management manuals and the associated Scalable Project Delivery Model [R3]. All project documents are defined in Appendix D - Project Document Management. Documents should be filed within the project documentation folder structure defined within Section 3.2. In addition, official records as identified in Appendix D shall be processed in accordance with Records and Document Management [R6] and registered in the appropriate document management system.

3.2 Document Repository and Structure

The project documentation storage structure has been standardized across the enterprise to align with project management requirements and the Scalable Project Delivery Model [R3]; increase accessibility, visibility and transparency to project information; and gain efficiencies in the transfer of project knowledge and knowledge management.

3.2.1 The Project Manager should ensure that the following requirements are applied:

(a) All project working documents are maintained and stored in one standardized SharePoint site in a hierarchal structure. Note: The standardized structure <u>does not</u> replace project records and controlled documents processes and requirements.

(b) The hierarchal <u>portfolio/program</u> folder structure is established by business unit down to the project # in alignment with the portfolio/program WBS.

(c) Access to the project folder/document structure is controlled. The Business Unit Project Management Office (PMO) is responsible for controlling access to the portfolio/program folder structure.

(d) Important project documents and correspondence are **not** stored and maintained in personal files or desktops.

(e) All the required project documentation is maintained and is available though out the project life cycle and post project closure.

4.0 ROLES AND RESPONSIBILITIES

4.1 Project Sponsor

(a) Reviews project performance reports.

(b) Identifies key stakeholders and champions the project, including marketing the project throughout the organization to ensure capacity, funding, and priority for the project.

(c) Actively and visibly demonstrates change leadership to promote adoption of changes associated with the project.

4.2 BU Executing Line

(a) Reviews project performance reports and ensures that reports are accurate and transparent, and that variances are correctly characterized and understood.

(b) Actively and visibly demonstrates change leadership to promote adoption of changes associated with the project.

4.3 Project Manager

(a) Plans, manages and monitors communications and project level reporting related to safety, quality, schedule, cost, and risk, including all variance explanations.

(b) Ensures project management data is entered into the PMIS to enable project and portfolio level reporting.

(c) Prepares and maintains a stakeholder management plan and ensures its ongoing effectiveness.

(d) Manages all project related documentation and records.

4.4 BU PMO

(a) On behalf of the Project Manager, may enter project management data into the PMIS to enable project and portfolio level reporting.

(b) As needed, assists the Project Manager with reporting including variances, project recovery plans and project vendor spending and budgets.

4.5 Enterprise PMO

(a) Acts as single point of contact for project communication and stakeholder management methodologies, processes, and associated tools and templates.

(b) Acts as single point of contact for reporting requirements including month-end processes.

(c) Administers and maintain Enterprise PMIS tool(s) / database(s).

(d) Creates, administers, maintains, and enhances datasets within PMIS.

5.0 DEFINITIONS AND ACRONYMS

5.1 Definitions

Integrated Reporting Plan	The reporting structure and flow of project performance information from the project teams to the Board of Directors.
Strategic Projects/Programs	A large and complex project/program approved by the Enterprise Leadership Team as strategic, and executed by the Enterprise Projects Organization.

5.2 Abbreviations and Acronyms

BCS	Business Case Summary
BU	Business Unit
CII	Construction Industry Institute
ePMX	Enterprise Project Management Extensions
ePPR	Enterprise Portfolio Project Report
EVM	Earned Value Management
IDB	Integrated Database
IRP	Integrated Reporting Plan
ME	Month End
PDRI	Project Definition Rating Index
PMIS	Project Management Information System
PMO	Project Management Office
PMP	Project Management Plan
WBS	Work Breakdown Structure

6.0 REFERENCES

6.1 Performance References

Ref #	Document Number	Document title
R1	OPG-STD-0148	Project Management
R2	OPG-STD-0140	Managing Change
R3	OPG-MAN-00120-0010	Project Integration Management – Appendix A: Scalable Project Delivery Model
R4	OPG-MAN-00120-0010	Project Integration Management
R5	OPG-MAN-00120-0016	Project Integrated Change Control
R6	OPG-PROC-0019	Records And Document Management

6.2 Developmental References

PMBOK Guide – Project Management Body of Knowledge

Construction Industry Institute (CII) Implementation Resource 322-2

Appendix A: Stakeholder Register and Communication Plan

A.1 STAKEHOLDER AND COMMUNICATION PLANNING TEMPLATE

Identify people/groups/organizations that could impact or be impacted by the project. Define the information that is to be shared, as well as the type of communication (actions). Consider changing stakeholders throughout the life cycle of the project including post project completion as they should be consulted or engaged to build buy-in and alignment. Include standardized reporting as per Scalable Project Delivery Model [R3].

Figure 2: Communication Plan Template (As per PMP; Integration Management Manual):

Stakeholders	Influence / Impact	Key Messages / Information	**Action(s)** *(e.g. meeting, email, training, CBT, job aid, report)*	Frequency	Owner(s)

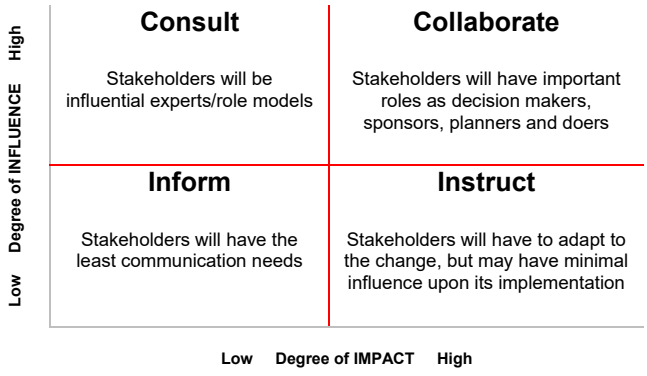
A.2 STAKEHOLDER AND COMMUNICATION PLANNING TERMS

The following section provides additional detail on how to develop an effective communication plan and stakeholder engagement strategy.

- **Stakeholders** – The individuals/groups/organizations that could impact or be impacted by the project. Stakeholders can be internal to the organization (such as line execution, engineering, station operations, work control, outage, finance, oversight committees etc.) or external (regulatory bodies, shareholders, public etc.)

  The ability of the project manager and team to correctly identify and engage all stakeholders in an appropriate way can mean the difference between project success and failure.

Figure 3: Stakeholder Assessment:



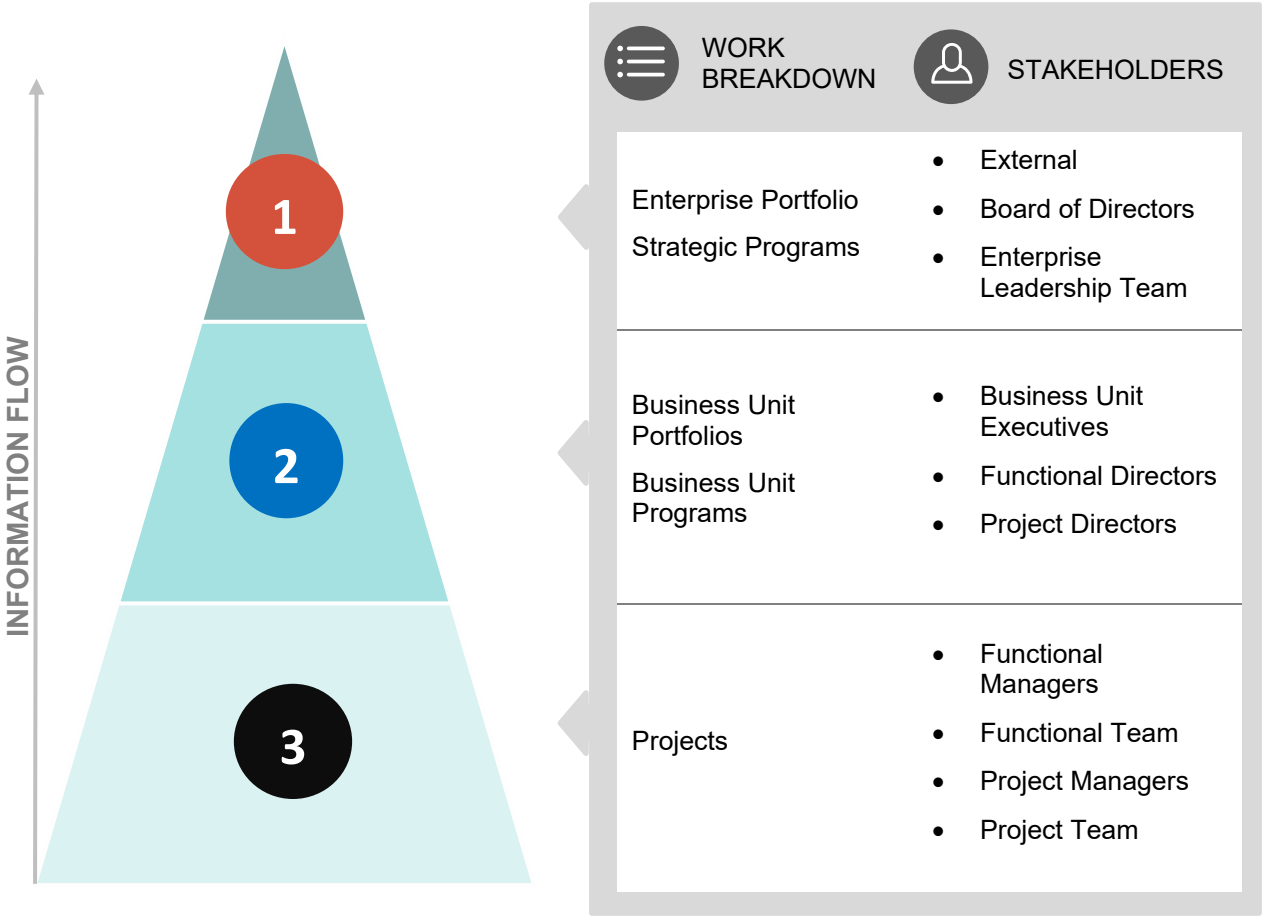
- **Influence/Impact** – Understanding the level of influence and impact that a stakeholder has will shape how you communicate to the stakeholder including the messaging (what), the action (how) and the frequency (when). This can be achieved through the Stakeholder Assessment (Figure 3) which categorizes stakeholders into Collaborate, Instruct, Consult and Inform.
- **Key Messages/Information** – What info are the stakeholders interested in and what are the key messages? What would the stakeholders have concerns about? This can range from general project performance to specific technical changes in the field.
- **Actions** – What type of communication will be used and how will the info will be transmitted? E.g. Interactive communication allows for multidirectional exchange of information in real time (meetings, presentations, roll-outs, phone calls, video conferencing etc.). Push communications is where information is distributed directly to the stakeholder (emails, memos, reports). Although efficient, there is no confirmation that the information was received or understood. Lastly, Pull communications require the stakeholder to access content at their own discretion (websites, intranet, databases). This is used for large/complex data sets.
- **Frequency** – When and how often should communications occur? The frequency should take into consideration the standardized month end process and availability of information.
- **Owner** – Who is responsible for initiating the conversation and ensuring that the material and messaging is appropriate?

  Note: Where possible leverage the standardized reporting and automated project management reports that utilize information stored in source systems such as EcoSys (cost) and P6 (scheduling).

Appendix B: Integrated Reporting Plan

B.1 INTEGRATED REPORTING PLAN (IRP)

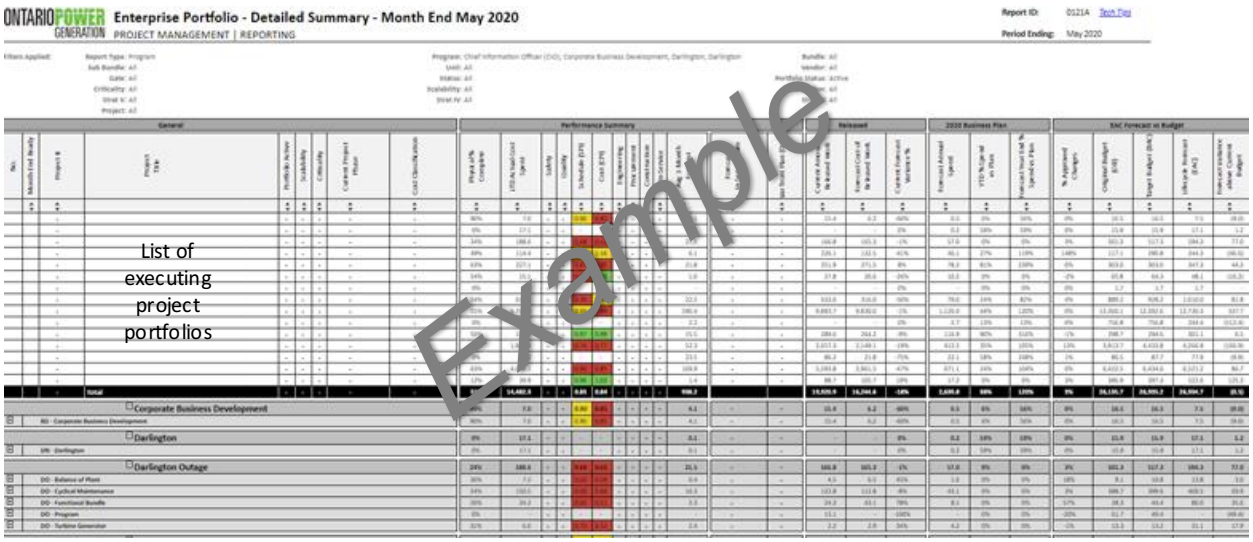
The **Integrated Reporting Plan** defines the reporting structure and flow of project performance information from the project teams to the Board of Directors. It supports timely and effective insight-driven decision making at the appropriate level of the organization, and is aligned with the project monitoring and control roles in the Project Integration Management manual [R4].



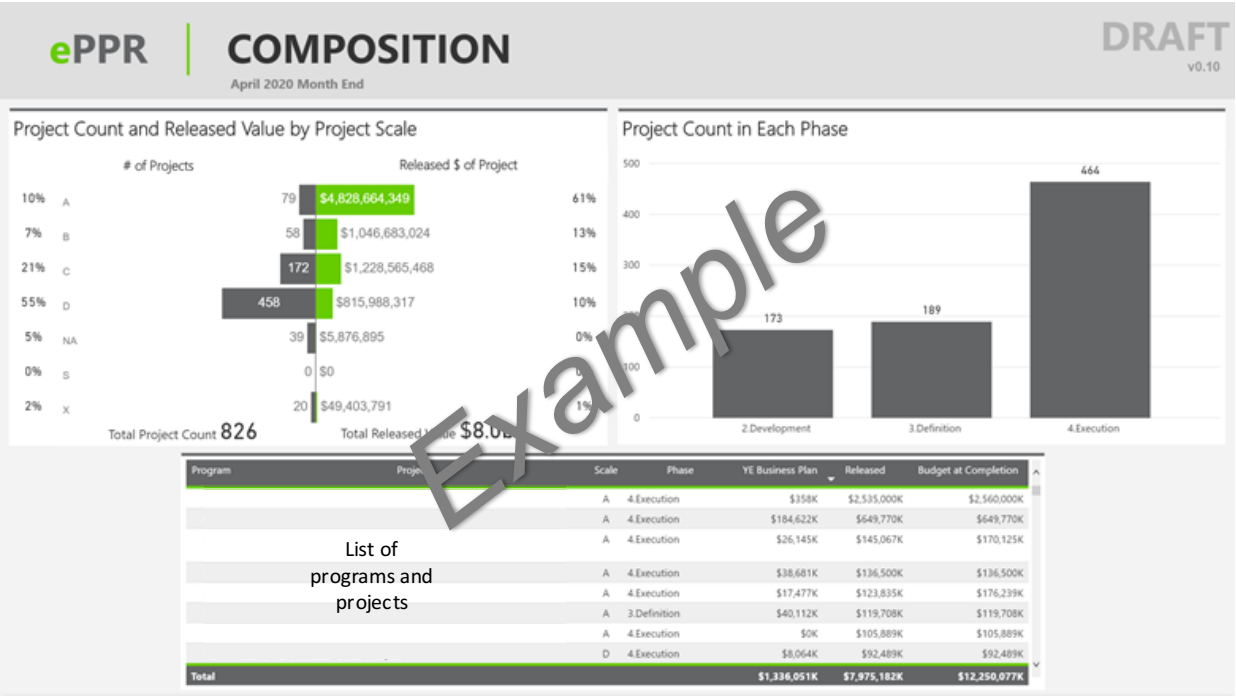
Note: Details on the IRP are provided on the Enterprise Project Management website.

Standardized Reporting Examples

Portfolio Report



Enterprise Portfolio Project Report (ePPR)



Program	Scale	Phase	YE Business Plan	Released	Budget at Completion
	A	4.Execution	$358K	$2,535,000K	$2,560,000K
	A	4.Execution	$184,622K	$649,770K	$649,770K
	A	4.Execution	$26,145K	$145,067K	$170,125K
	A	4.Execution	$38,681K	$136,500K	$136,500K
	A	4.Execution	$17,477K	$123,835K	$176,239K
	A	3.Definition	$40,112K	$119,708K	$119,708K
	A	4.Execution	$0K	$105,889K	$105,889K
	D	4.Execution	$8,064K	$92,489K	$92,489K
Total			$1,336,051K	$7,975,182K	$12,250,077K

PULSE Website

EPL ✓ | P6 Schedule ✓ | P6 Baseline ✓ | 99999 99999 - [Redacted] | EcoSys ✓ | RMO ✓ | AS7 ✓

WBS		Project Staff		Other	
Program:	Projects and Mods	Project Manager:	[Redacted]	Vendor:	[Redacted]
Bundle:	Darlington	Controls Specialist:		Status:	PEIS
Unit:	DN	Strat V:		Scale:	A
WBS Path:	PM.DN.DN.DN.DN.[Redacted]	Engineering Strat V:		Criticality:	Yes

KEY INDICATORS *(Short Explanation - see narrative section for additional detail)*

	Safety	No Status Update Provided.
	Quality	No Status Update Provided.
0.96	Schedule (SPI)	Current delay in [Redacted] will delay the final AFS of [Redacted]
0.99	Cost (CPI)	Project is on track on cost spending.
	Engineering	No Status Update Provided.
	Procurement	No Status Update Provided.
	Construction	No Status Update Provided.
	In-Service	No Status Update Provided.
(248%)	Forecast	
94%	% Release Spent	

Click **here** to provide text updates.

NARRATIVE DISCUSSION & EXPLANATION

Overview:
To replace[Redacted . This will allow Darlington to ensure a continued supply of spares, increase equipment reliability and reduce the demands on maintenance resources.

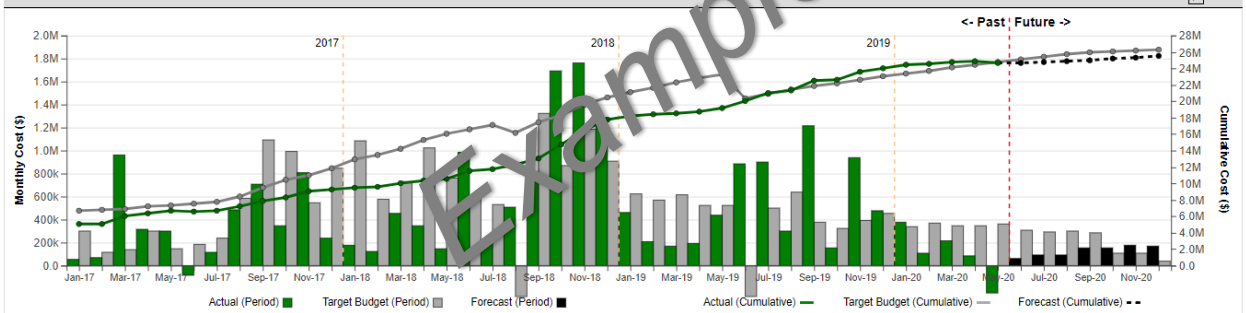
Project Highlights for Period:
[Redacted] Completed and AFS is under progress (TCD- Feb 2020).

Plan for Upcoming Period:
Planning for commissioning of [Redacted] support operations [illegible] from Q2 [illegible] 2020.

COST SUMMARY ($k)	% of Plan	Plan	Forecast	Actual	Variance	Δ Period
Period - This Month	(65%)	361	95	(236)	(597)	-
Cumulative - Life-to-Date	99%	24,784	TBD	24,610	(174)	(597)
Released	95%	26,244	25,052	-	(1,192)	(61)
Lifecycle - At Completion	100%	26,244	26,245	-	1	(61)

OVERALL PROGRESS			Plan	Forecast	Actual	Variance
Overall:	93.8%	Period:	1.4%	(0.9%)	(0.9%)	(2.3%)

COST PERFORMANCE & FORECASTING



Click here to view the CPI Trend for this project.

PIEPCCC Elements: Select All; 0 - Cost Management; 1 - Project Management; 2 - Inspections; 3 - Engineering; 4 - Procurement; 5 - Construction; 6 - Commissioning; 9 - Closeout; O - Other; U - Uncategorized; F - Functional

Include Interest? Reset

Period Values On Off | Year Markers On Off | Cumulative Values On Off | Cumulative Gridlines On Off

X-Axis Range (Years) Start 2017 Finish 2021

Example

Project Dashboard (A, B and C)

ONTARIO POWER GENERATION — ENTERPRISE PROJECT OFFICE - MONTHLY REPORTING | AUGUST 2020

99999 - Example Project

PERIOD: Tech Tips **August 2020**

PM: [Redacted] **SPONSOR:** [Redacted] **VENDOR:** [Redacted] **TYPE:** Capital **PHASE:** Execution **SCALE:** A

KEY INDICATORS *(Short Explanation-see narrative section for add'l detail)*

	Safety	
	Quality	
1.04	Schedule (SPI)	Current delay in [Redacted] will delay the final AFS of [Redacted].
0.98	Cost (CPI)	Project is on track on cost spending.
	Engineering	
	Procurement	
	Construction	
	In-Service	
83%	Forecast (1mth)	
94%	% Released	

NARRATIVE DISCUSSION & EXPLANATION

Overview:
To replace [redacted]. This will allow [Redacted] to ensure a continued supply of [redacted]and [redacted].

Project Highlights for Period:
[Redacted] Completed and [illegible] in progress (TCD- [Redacted]).

Plan for Upcoming Period:
Planning for decommissioning of [Redacted]support operations scheduled from [Redacted] to[Redacted], 2020.

COST SUMMARY ($k)

	% of Plan	Plan	Forecast	Actual	Variance	Δ Period
Period - This Month	32%	274	104	86	(188)	N/A
Cumul. - Life-to-Date	105%	23,602	N/A	24,793	1,191	(1,[illegible])
Released	96%	26,244	25,186	N/A	(1,05[illegible])	(17[illegible])
Life Cycle - At Completion	100%	26,244	26,118	N/A	(1[illegible])	(17)

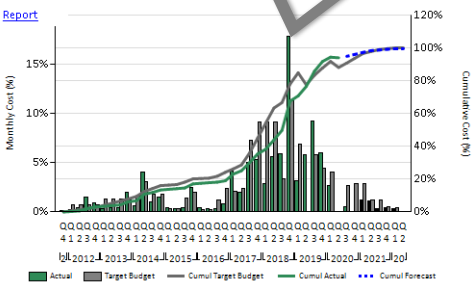
OVERALL PROGRESS

	% of Plan		Plan	Forecast	Actual	Variance
Overall:	94.5%	Period:	[illegible]	0.3%	[illegible]%	(0.7%)

KEY ISSUES AND ACTIONS

	Issue	Action
1	Delays in [Redacted] will delay [Redacted].	Continue to monitor [Redacted]

Report



KEY MILESTONES (Tier 1 and 2)

	Plan	Forecast	Var. (D)	Δ (D)
SOI - [Redacted]	28-Oct-2019	11-Nov-2019 (A)	14	0
E - Finish of [Redacted]	04-Jan-2021	04-Jan-2021	0	0
AFS - AFS [Redacted]	29-Apr-2021	29-Apr-2021	0	0
AFS - AFS [Redacted]	29-Apr-2021	29-Apr-2021	0	0
AFS - AFS [Redacted]	29-Apr-2021	29-Apr-2021	0	0

ONTARIO POWER GENERATION — ENTERPRISE PROJECT OFFICE - MONTHLY REPORTING | AUGUST 2020

99999 - Example Project

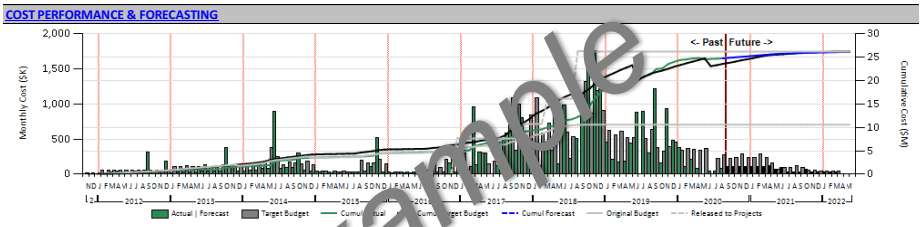
PERIOD: Tech Tips **August 2020**

PM:[Redacted] **SPONSOR:** [Redacted] **VENDOR:** [Redacted] **TYPE:** Capital **PHASE:** Execution **SCALE:** A

KEY RISKS & OPPORTUNITIES (Top 3 ranked)

	Action (Mitigation/Monitor)	Risk Score	Post Score
12345 - 99999 - Schedule and cost impacts due to delays of [Redacted]		10	10
11111 - There is a technical risk to [Redacted].		6	6

COST PERFORMANCE & FORECASTING



NEAR TERM COST BY PIEPCCC + OVERALL LIFE CYCLE COST PERFORMANCE ($K)

Description	Line Type	TCD	Eng	At Comp	########	########	Jul 2020	########	########	########	########	########	########	########	########	########
0 - Cost Management	Actual | Forecast	39[illegible]	3	34[illegible]	3	3	3	3	3	3	3	3	3	3	3	3
	Plan (TB)	[illegible]	1	545	3	3	3	4	4	4	5	4	-	-	-	-
1 - Project Management	Actual | Forecast	[illegible],786	14[illegible]	4,926	8	7	8	8	10	10	10	10	10	10	10	10
	Plan (TB)	3,450	201	3,652	30	(40)	9	12	9	9	12	9	10	13	10	10
3 - Engineering	Actual | Forecast	1,633	829	15,462	(247)	38	39	74	91	91	91	91	96	91	91	91
	Plan (TB)	[illegible]	1,720	14,165	214	(1,296)	184	230	184	200	246	200	202	247	204	123
4 - Procurement	Actual | Forecast	1,909	-	1,909	-	-	-	-	-	-	-	-	-	-	-	-
	Plan (TB)	3,170	-	3,170	-	-	-	-	-	-	-	-	-	-	-	-
5 - Construction	Actual | Forecast	1,836	-	1,836	-	-	-	-	-	-	-	-	-	-	-	-
	Plan (TB)	2,334	-	2,334	-	-	-	-	-	-	-	-	-	-	-	-
6 - Commissioning	Actual | Forecast	1,229	-	1,229	-	-	-	-	-	-	-	-	-	-	-	-
	Plan (TB)	1,600	-	1,600	40	-	-	-	-	-	-	-	-	-	-	-
9 - Closeout	Actual | Forecast	2	320	322	-	-	-	2	-	-	-	-	-	-	-	20
	Plan (TB)	75	704	779	74	(341)	23	29	23	23	29	23	23	29	23	23
U - Unallocated	Actual | Forecast	1		1												
Total	**Actual | Forecast**	**24,793**	**1,324**	**26,118**	**(236)**	**48**	**50**	**86**	**104**	**104**	**104**	**104**	**109**	**104**	**104**	**124**
	Plan (TB)	**23,602**	**2,642**	**26,244**	**361**	**(1,675)**	**219**	**274**	**220**	**236**	**291**	**237**	**235**	**289**	**238**	**156**

Example

Appendix C: Project Records

The following are the Project Management records which may be generated by use of the suite of Manuals and the Scalable Project Delivery Model [R3]. All project documents as defined in the following table should be filed within the project documentation folder structure defined within Section 3.2. Official Records as noted in this table shall also be processed in accordance with OPG-PROC-0019, Records and Document Management and registered in the appropriate document management system.

This table provides general guidance as to the filing requirements. Filing may differ from this table based on BU specific requirements, however requirements of OPG-PROC-0019 and any other associated governance shall still apply.

The records within this table may not be an inclusive list of all records. Additional records generated through other interfacing processes and governance shall be filed in accordance with BU requirements as defined in the interfacing process governance.

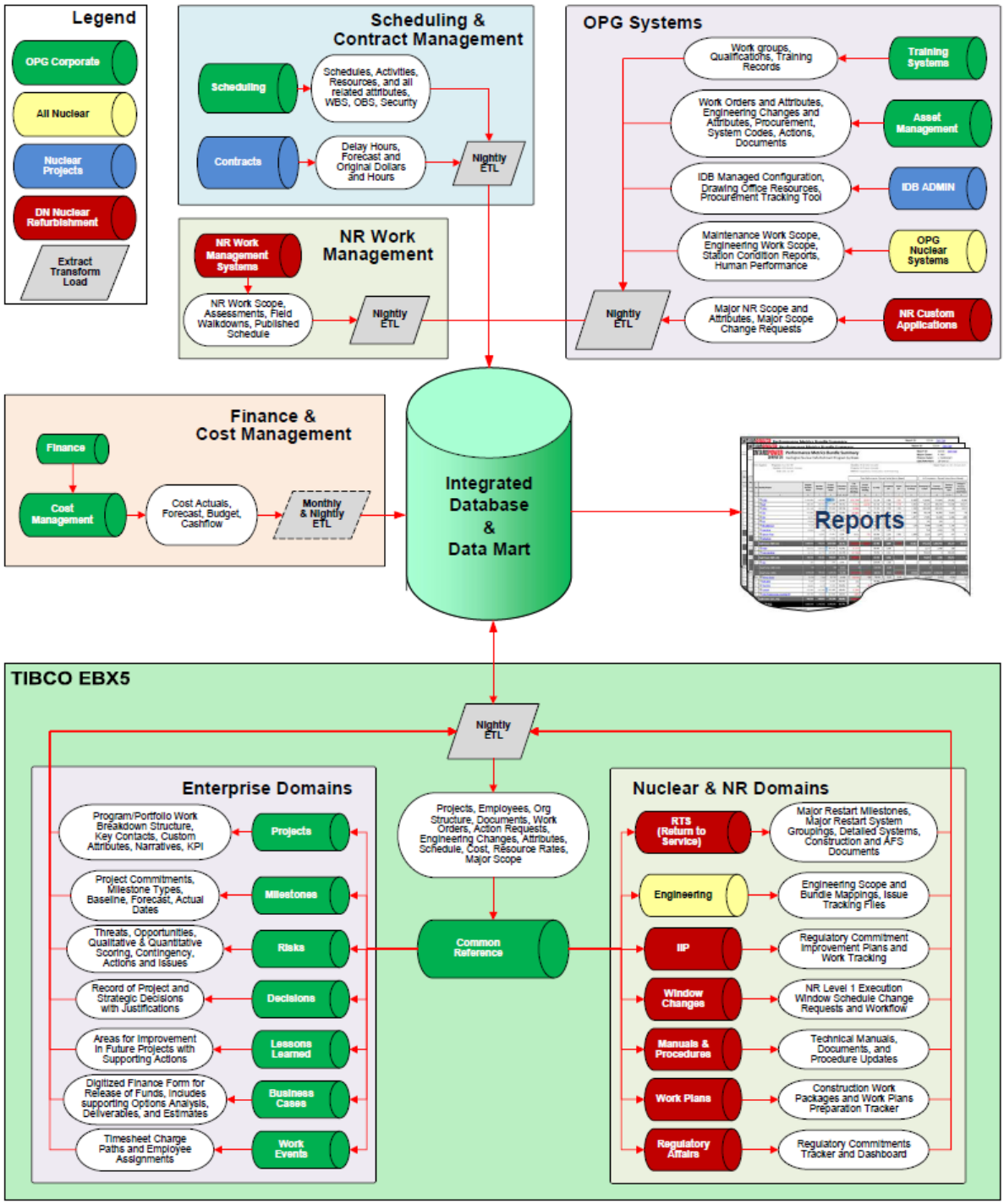
Project Records Table

Knowledge Area	Record Created OR Input to Source System	Associated Form or Template Number	QA Record? Y/N	Records Management System Filing Information/Retention Or Source System Maintained
Phase-Gating	Gate Progression Form (Gate 1, 2, 3)	Portfolio Projects: OPG-TMP-0025 PEXT Projects Appendix: GATE-FORM-004 Nuclear Refurb all Gates/Safe Storage Gate 3: N-TMP-10220 SAFE STORAGE Gate 2: GATE-FORM-003	N	Indexed in Approved Information Management System (AIMS) Document Number: Document Type - PLAN, Subtype – GPF Facility-GPF-00120-7 digit Records Management (RM) Sequence Number RRC: ADM-0015 Retention: T-10 Years
	Business Case Summary (BCS)	OPG-FORM-0076		As per OPG-STD-0076
	EcoSys Quality Check	GATE-FORM-001	N	Retained by Department (Project file)
	P6 Schedule Quality Checks	GATE-FORM-002	N	Retained by Department (Project file)
Integration Management	Project Charter	OPG-TMP-0027	N	Indexed in AIMS Document Number: Document Type - PLAN, Subtype – PCH Facility-PCH-00120-5-digit Controlled Document (CD) Sequence Number

Knowledge Area	Record Created OR Input to Source System	Associated Form or Template Number	QA Record? Y/N	Records Management System Filing Information/Retention Or Source System Maintained
				RRC: ADM-0015 Retention: T-10 Years
	Project Management Plan	OPG-TMP-0026	N	Indexed in AIMS Document Number: Document Type - PLAN, Subtype – PMP Facility-PMP-00120-5-digit CD Sequence Number RRC: ADM-0015 Retention: T-10 Years
	Project Level Calculation Sheet	INT-TMP-002	N	Retained by Department (Project file)
	Cost and Schedule Month-End Checklist	INT-TMP-001	N	Retained by Department (Project file)
	Project Closure Report	FIN-FORM-PA-005		As per FIN-PROC-0030
	Post Implementation Review	FIN-TMP-PA-002		As per FIN-PROC-0030
	Report of Equipment In-Service (REIS)	FIN-FORM-PA-004		As per FIN-PROC-0030
	Project Issue Log	N/A	N	Retained by Department (Project file) or in Source System: ePMX
	Lessons Learned	N/A	N	Retained by Department (Project file) or in Source System: ePMX
Integrated Change Control	Change Control Form	Nuclear Refurbishment: N-FORM-11252	N	Nuclear Refurbishment: Indexed in AIMS Document Number: Facility-REF-SCI/GSI/USI-7 digit RM Sequence Number RRC: N02-0049 Retention: 10 years
		All other projects: CHG-FORM-001	N	All other projects: Retained by Department (Project file)
	Change Log	N/A	N	Maintained in Source System: EcoSys
	Project Over Variance Approval	OPG-FORM-0077		As per OPG-STD-0076
Scope Manage	Requirements Traceability Matrix	Nuclear associated with ECC: N-FORM-11621		Nuclear – As per N-GUID-00590-00001/N-PROC-MP-0090

Knowledge Area	Record Created OR Input to Source System	Associated Form or Template Number	QA Record? Y/N	Records Management System Filing Information/Retention Or Source System Maintained
		All other projects: OPG-FORM-0275	N	All Other projects - Indexed in AIMS Document Number: Facility-PLAN-00120-7 digit RM Sequence Number RRC: ADM-0015 Retention: T-10 Years
	Requirements Listing	N/A	N	Retained by Department (Project file)
	Scope of Work	OPG-TMP-0028	N	Indexed in AIMS Document Number: Document Type - PLAN, Subtype – SOW Facility-SOW-00120-5 digit CD Sequence Number RRC: ADM-0015 Retention: T-10 Years
	Value Engineering	N/A	N	Retained by Department (Project file)
	Project Definition Rating Index (PDRI)	N/A	N	Retained by Department (Project file)
	Work Breakdown Structure (WBS) and WBS Dictionary	SCOPE-TMP-001	N	Retained by Department (Project file)
	Scope Validation Reports (e.g. AFS, Turnover Reports)			As per Line of Business/Station Requirements
Schedule Management	OPG L2 schedule baseline and associated updates	N/A	N	Maintained in Source System: For scale A and B projects, schedules are stored in P6, otherwise not required per scalability model
	Vendor L3 schedule baseline or working level schedule/activity list and associated updates	N/A	N	Maintained in Source System: For scale A projects, schedules are stored in P6, otherwise not required per scalability model
	Key project milestones	N/A	N	Maintained in Source System: For Scale A, B and C projects, schedules are stored in P6, otherwise in ePMX per scalability model.
	Basis of Schedule	SCH-TMP-001	N	<u>Basis of Schedule for Project Level A/B/C projects:</u> Indexed in AIMS as Record Document Number: Document Type - PLAN Facility-PLAN-00120-7-digit RM Sequence Number RRC: ADM-0015 Retention: T-10 Years

Knowledge Area	Record Created OR Input to Source System	Associated Form or Template Number	QA Record? Y/N	Records Management System Filing Information/Retention Or Source System Maintained
Estimating	Basis of Estimate	BOE-TMP-005	N	BoE Template for OPG Use for Project Level A/B projects: Indexed in AIMS as Record Document Number: Document Type - PLAN, Subtype – BOE Facility-BOE-00120-7-digit RM Sequence Number RRC: ADM-0015 Retention: T-10 Years
		BOE-TMP-006		BoE Template for Vendor Use Retained by Department (Project file)
		Notes/ Assumptions document	N	Notes/Assumptions to be documented for Project Level C/D projects: Retained by Department (Project file)
	Estimate File	EST-TMP-003 EST-TMP-004	N	Included as an appendix in BOE document (A/B projects) or Retained by Department (Project file) Estimating template – Simple Estimating template – Detailed
Cost Management	Cost baselines, Earned Value cost, and forecasts	N/A	N	Maintained in Source System: EcoSys
Communications and Stakeholder Management	Portfolio Report	N/A	N	Stored in PMIS
	Project Dashboard	N/A	N	Stored in PMIS
	Project Status Report (Written)	N/A	N	Indexed in AIMS as Record Document Number: Document Type - REP, Subtype – PSR Facility-REP-00120-7 digit RM Sequence Number RRC: ADM-0015 Retention: T-10 Years
	Vendor Performance Package	N/A	N	Retained by Department (Project file)
Risk Mana	Risk Register	N/A	N	Maintained in Source System: For scale A, B and C projects risk information is stored in ePMX per scalability model.

Knowledge Area	Record Created OR Input to Source System	Associated Form or Template Number	QA Record? Y/N	Records Management System Filing Information/Retention Or Source System Maintained
				D level projects have the ability to use the ePMX for their risk register should they choose, but it is not mandated.
		RISK-TMP-001	N	Project Level C/D Retained by Department (Project file) (EMV applicable to Project Level C only)
	Monte Carlo Input File	RISK-TMP-002	N	Retained by Department (Project file) (applicable to Project Level A/B)
Procurement Management	Various			Per requirements of OPG-PROG-0009 and OPG-PROG-0038

Appendix D: Project Management Information System [Illustration]