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PROJECT INTEGRATION MANAGEMENT

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Revision Summary

Revision Number	Date	Comments
R000	2019-03-26	Initial issue.
R001	2019-11-21	Revised Appendix A - Scalable Project Delivery Model. Updated section 2.6 to clarify oversight activities.
R002	2020-09-11	Incorporate changes to: - Supersede N-GUID-00700-10010 Project Charter Guide with this manual. - Replace RMO with ePMX. - Revise Issue Management. - Add Document Decisions section including Decisions Record and Analysis Summary (DRAS).
R003	2020-11-30	Updated 2.2.3 and 2.2.4 to provide an optional stakeholder signature to document concurrence as determined by the Project Management Executing Line Authority. Updated wording in Decisions Section Added definitions for R1 and R2 to Definitions table Updated Appendix A Scalable Delivery Model Updated Appendix B Project Level Classification – Add $200K lower limit Updated Appendix D Month End Schedule Example (change RMO to ePMX)

1.0 DIRECTION

The objective of Project Integration Management is to outline and provide guidance on the processes necessary for effectively managing project activities and deliverables, as well as their integration, so that the project goals and outcomes are successfully achieved.

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.

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

> The Scalable Project Delivery Model [Appendix A] 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 in a project file as per standard Project Documentation structure. Related project records and controlled documents should be managed in accordance with the Project Communication and Stakeholder Management manual [R2].

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 Integration Management is the main process through which the project manager ensures that all components of the project are adequately developed, coordinated, managed and aligned. It involves identifying, defining, combining, unifying and coordinating the various activities and tasks of a project to support the management of all the activities throughout the project life cycle. The effort and level of detail required to manage and integrate the project is reflective of the projects complexity, cost and overall risk to the enterprise.

Project Integration Management also includes making choices about, resource allocation, balancing competing demands, examining any alternative approaches, tailoring the processes to meet the project objectives, and managing the interdependencies among the *project management knowledge areas*.

The Project Integration Management processes are:

- Classify Project Level – Scalable Project Delivery Model (Section 2.1)
- Develop Project Charter (Section 2.2)
- Develop Project Management Plan (Section 2.3)
- Direct and Manage Project Work (Section 2.4)
- Manage Project Knowledge (Section 2.5)
- Monitor and Control Project Work (Section 2.6)
- Perform Integrated Change Control (Section 2.7)
- Close Project or Phase (Section 2.8)

In addition to the project integration management processes listed above, successful coordination and alignment of project teams, processes, systems, and interfaces is achieved through the use of the a standardized *Work Breakdown Structure* (WBS) (as detailed in Project Scope Management [R3]) and Project Phase-Gate Management [R4].

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

2.0 PROJECT INTEGRATION MANAGEMENT PROCESS

Integration Management involves identifying, defining, combining, unifying and coordinating various activities and tasks of a project to support the management of all the activities throughout the project life cycle.

2.1 Classify Project Level – Scalable Project Delivery Model

The intent of the risk-based, scalable project delivery model is to match the level of project planning, preparation and review effort with the project's potential impact to safety, quality, cost and schedule.

Project level classification determines the level (scale) for which the project should be planned, executed, monitored and controlled, and closed out. *Project level classification* occurs in three steps:

1. **Determine Project Complexity:** For each of the six criteria, rate the project complexity (1 to 4). If more than one complexity level applies for any criteria, the higher level should be used. Determine the total project complexity score by adding the ratings in each criteria.
2. **Estimate Project Total Cost:** Determine the projects estimated total cost at completion of the project (including contingency). It is recognized that the estimated total project cost during the initial phases of a project may equate to a range due to the level of scope definition.
3. **Determine the Project Level:** Classify the project level (A, B, C or D) based on the complexity and estimated project total cost.

2.1.1 All projects should be classified to a project level based on the projects complexity and anticipated cost at completion as per *Project Level Classification* [Appendix B].

2.1.2 Classification of the project level should occur during the initiation phase, and should be documented with justification, in the *project charter*. The project level should be re-assessed periodically (typically during next phase planning and gate package preparation) to ensure the correct scale and requirements are being applied to project planning and controls.

2.1.3 The project level should be determined by the project execution line authority and accepted by the sponsor. The *governing body* may mandate a different project level and/ or phase deliverables. The decision to change the project level and/or phase deliverables may impact the cost of project delivery; thus, this decision should be risk based.

2.2 Develop Project Charter

Develop Project Charter is the process of developing a document that formally authorizes the existence of a project and provides a direct link between the project and the strategic objectives of the organization, creates a formal record of the project, and shows that the organization is committed to the project. At a high level, the *project charter* ensures a common understanding by the stakeholders of the key deliverables, milestones and the roles and responsibilities of everyone involved in the project.

2.2.1 The *project charter* should be prepared during the identification (lead-in) phase of the project life cycle and further refined during the initiation phase. The *project charter* should be prepared by the project sponsor (or delegate) or, if one has been assigned, the project manager to sign off on the project charter.

2.2.2 The *project charter* should be prepared in the standardized template [available on the Enterprise Project Management website] and reflective of the projected project level. The *project charter* should include the following (as applicable):

- Background and proposal
- Problem Statement, business driver/gap
- Preliminary Project Level and Gate Strategy
- Project objectives
- Commitments and considerations (regulatory, safety, environmental etc.)
- Major milestones
- Stakeholder summary
- Funding/Cost
- Resources (project team)
- Project boundaries
- Risks
- Technical considerations

2.2.3 The *project charter* should be reviewed and concurred by the appropriate stakeholders prior to approval.

2.2.4 The *project charter* should be approved by the project sponsor and accepted by the approving authority of the executing organization. Concurrence by key stakeholder(s) may be added as signatory(ies) as determined by the Project Management Executing Line Authority. The project sponsor should confirm that the proposed benefits are aligned with the OPG strategic business objectives. Following acceptance of the *project charter*, a project manager should be assigned/ appointed by the approving authority of the executing organization.

2.2.5 The *project charter* should be included as an input into Gate 0 and Gate 1, to obtain the necessary approvals from the *governing body* to proceed to conceptual development or initiation phase funding as per Project Phase-Gate Management [R4] process. The progression of the project into the Business Unit Project Portfolio is managed through the Project Portfolio Management process, in alignment with business planning. Funding approval is managed in accordance with the Organizational Authority Register (OAR) [R5] and Developing and Documenting Business Cases [R6].

2.2.6 The accepted *project charter* should be submitted to controlled documents as per document management requirements within Project Communication and Stakeholder Management [R2]. Subsequent revisions to the *project charter* should be concurred, approved and accepted in alignment with the original authority level.

2.3 Develop Project Management Plan (PMP)

Develop *Project Management Plan* (PMP) is the process of defining, preparing and coordinating all plan components, and consolidating them into an integrated PMP. The PMP provides the project team, and interfacing organizations, a common understanding of the scope, assumptions, constraints, risks, and resources, and defines how project integration management will occur as processes interact. The key benefit of this process is the production of a comprehensive document that defines the basis of all project work and how the work will be performed, including any monitor and control activities (i.e. oversight-related activities. See section 2.6)

The PMP is a formal, approved document defining how the project will be planned, executed, monitored, controlled, and closed out, as well as how the *project management knowledge areas* are integrated (Appendix C). It is a key component of gate decisions.

Note: More complex and costly projects will require more detail to be included within the PMP than a low complexity and low cost project. The level of detail is to be reflective of the potential risk and should be determined by the project manager and Business Unit Executing Line.

2.3.1 The initial PMP should be prepared during development phase, and then updated as the project progresses through each phase of the project life cycle as per Project Phase-Gate Management [R4].

2.3.2 The project *performance measurement baselines* for scope, schedule, and cost should be included in the initial issue of the PMP so that the project execution can be measured and compared and performance can be managed. Changes at each update should be identified and assessed. This results in a PMP that is progressively elaborated by controlled and approved updates extending through to project closure.

2.3.3 The PMP should be prepared by the project manager with input from the project team and other stakeholders as required.

2.3.4 The PMP should be prepared in the standardized template [available on the Enterprise Project Management website], which typically includes the following sections:

(1) Project Description and Background

(2) Gate Strategy

(3) Management Plans for each of the following areas: scope, schedule, cost, safety and environment, quality, resource, communication & stakeholder, risk, procurement, stakeholder, change

(4) Performance Measurement

(5) Document Management plan

2.3.5 The PMP should identify and plan for integration with interfacing groups and processes, including but not limited to:

- Work management requirements established by the station and/or facility (e.g. station outage and online execution planning expectations);
- Contract management and supply chain requirements;
- Engineering and configuration requirements (e.g. Engineering change control); and
- Vendor interface coordination

2.3.6 The PMP should reference the projects standard WBS as defined and elaborated during the project life cycle. Details on the WBS definition and application are provided in the Project Scope Management manual [R3].

The WBS is a key project deliverable that organizes the team's work into manageable pieces of defined project scope. It provides a hierarchical, comprehensive description of the total scope of work (SoW) to be executed, and serves as a foundation for realistic planning and meaningful performance measurement. The WBS is translated into the scheduling system and rolled up into the *cost breakdown structure* (CBS) for implementation within the cost system. This allows for integrated scope, cost and schedule management and change control. Establishing an effective WBS early during planning is essential for successful project integration.

2.3.7 The PMP should be approved by the Business Unit Execution Line, with an appropriate level of authority for the given project level and other relevant considerations.

2.4 Direct and Manage Project Work

Direct and Manage Project Work is the process of leading and performing the work defined in the PMP and implementing approved changes to achieve the project's objectives. The key benefit of this process is that it provides overall management of the project work and deliverables, thus improving the probability of project success. This process is performed throughout the project.

2.4.1 The project manager is responsible for directing and managing project work, work performance, change requests, corrective actions and project document updates including the PMP.

2.4.2 The project manager should direct and manage project work in accordance with the Scalable Project Delivery Model [Appendix A] and the related set of Enterprise Project Management manuals.

2.4.3 The project manager should consider engaging individuals or groups with specialized knowledge or training in topics such as technical knowledge, cost and budget management, legal and procurement, legislation and regulations, estimating, schedule management and risk management etc.

2.4.4 Manage Issues

2.4.4.1 The project manager is responsible to identify and manage any issues that may impact cost, schedule and other aspects of the project. Examples of issues are problems, gaps, inconsistencies or conflicts that were identified or occur unexpectedly, as well as any risks that have been realized.

2.4.4.2 The project manager should document and track issues within the Issues module of the Enterprise Project Management tool (ePMX). Information typically included are issue description, priority, responsible party, action, target completion date, and status.

2.4.4.3 Issues should be analyzed and associated actions should be documented in the actions module and linked to the respective issue within the ePMX tool.

2.4.4.4 The project manager should ensure issues are periodically reviewed and managed by priority, and actions tracked to completion to ensure that issues are appropriately addressed.

2.4.5 Manage Decisions

2.4.5.1 Throughout a project's life cycle, concepts may be initiated/proposed for analysis and decision, which may involve significant changes and impacts in areas such as strategy,

regulatory interactions, scope, project management processes, Project Management Information Systems (PMIS), and reports.

2.4.5.2 Documenting Decisions and maintaining as a record in an auditable centralized repository is critical for review, reference and monitoring purposes. The Decisions Module within Enterprise Project Management Extensions (ePMX) should be used for this purpose. Refer to Desktop Guide – Enterprise Project Management Extensions (ePMX).

2.4.5.3 The Decisions module caters to two types of Decisions:

1. For Portfolio projects, the module includes a new Decision Record (DR), which is available for use for documentation purposes only. This may include decisions impacting an entire business unit, multiple business units or an individual portfolio project where the Project Manager deems it necessary to document, track and report the decision.
2. For Strategic Projects, the Decision Record and Analysis Summary (DRAS) form should be used to initiate the process to analyze and approve or reject the concept, and to document the decision.

   Note: Strategic Projects will not use the DR form unless authorized by the Director of PMO.

2.4.5.4 A DRAS should be completed by all Strategic Projects if a proposed concept:

(a) Impacts the entire program of a Strategic Project;

(b) Impacts the Strategic Project's scope database - this includes changes to (an) existing scope record(s) and/or adding a new scope record. Note: This is only applicable if the Strategic Project has a scope database.

(c) Is an injection of scope from a Portfolio Project into a Strategic Project; and/ or

(d) Is a strategic, programmatic, or significant decision requiring a detailed cost-benefit analysis and impact assessment to obtain approval.

2.4.5.5 The Project Manager is accountable for managing Decisions. In the case of the DRAS, this includes obtaining approval by the appropriate authority.

2.4.5.6 If the Decision impacts the project scope, cost, and/or schedule baseline, the DR/DRAS should precede the Project Integrated Change Control [R9] process and can be used as a supporting document.

2.4.5.7 If the Decision requires subsequent action(s) to be completed as a result of the Decision made, associated Actions should be documented in ePMX.

2.5 Manage Project Knowledge

Manage Project Knowledge is the process of using existing knowledge and creating new knowledge to achieve the project's objectives and contribute to organizational learning. The key benefits of this process are that prior organizational knowledge is leveraged to produce or improve the project outcomes, and knowledge created by the project is

available to support organizational operations and future projects or phases. This process is performed throughout the project.

The key activities that underpin this process are knowledge sharing and knowledge integration. From an organizational perspective, knowledge management is about ensuring that the skills, experience, and expertise of the project team and other stakeholders are used before, during, and after the project.

The most important part of knowledge management is creating an atmosphere of trust so that people are motivated to share their knowledge. This is done using a mixture of knowledge management tools and techniques (interactions between people) and information management tools and techniques.

2.5.1 The project manager should ensure that project knowledge is shared and integrated into the project throughout the project life cycle. This includes creating an environment that values and enables knowledge transfer and sharing of information and experiences.

2.5.2 The application of knowledge management tools and techniques should be scaled and appropriate for the specific project. Projects that have a high degree of innovation, project complexity, or a level of diversity across team members may require a more structured approach to knowledge management.

2.5.3 The project manager or team member should engage Subject Matter Experts (SMEs) and stakeholders as appropriate.

2.5.4 *Lessons learned* reviews should occur during the planning for each phase of the project, and be incorporated into project plans. These reviews should include the identification, capturing, and sharing of *lessons learned* from the current project and other projects or relevant work. Sources of *lessons learned* may include:

- External or internal operating experience (OPEX)
- Other project documents such as PMPs, risk registers, Post Implementation Reviews (PIR), and change logs
- Station Condition Records (SCR) and vendor partner's corrective action programs
- Self-assessments and audits
- Site walk downs, document reviews, meetings, or workshops
- External regulatory or stakeholder reviews
- Risk closeout meetings
- *Lessons learned* workshops

2.5.5 Project learnings should be documented and stored in a *lessons learned* repository.

2.5.6 Project learning should be identified on an ongoing basis to ensure that information is accurate, complete, and documented as necessary.

2.6 Monitor and Control Project Work

Monitor and Control Project Work, is the process of observing, tracking, reviewing, and reporting progress on overall work and work products, to meet the performance objectives defined in the PMP. The key benefits of this process are that it allows stakeholders to understand the current state of the project, to timely identify any performance issues, recognize the actions taken to address these issues, and to have the visibility into the future project status for cost and schedule. This process is performed throughout the project.

2.6.1 The project manager should perform monitor and control activities, including but not limited to:

(a) Comparing actual project performance against the PMP and scope, cost and schedule *performance measurement baselines*, and safety and quality requirements/ targets.

(b) Assessing performance periodically to determine whether any corrective or preventative actions are indicated, and the recommending of those actions as necessary.

(c) Checking the status of individual risks and issues.

(d) Maintaining an accurate, timely information base concerning the project's products and their associated documentation through project completion.

(e) Providing information to support status reporting, including validation of progress and the basis of the forecast.

(f) Providing forecasts to update current cost and current schedule information.

(g) Applying cost based Earned Value Management (EVM) to A, B, C level projects; and schedule based EVM should be applied to A and B level projects.

(h) Monitoring implementation of approved changes as they occur.

(i) Providing appropriate reporting on project progress and status to program/portfolio management.

(j) Ensuring that the project stays aligned with the business needs and strategic objectives.

> Earned Value Management is an integrated management control system for assessing, understanding and quantifying what the project is achieving, measured against project approved budget and schedule. A standardized WBS and CBS is applied, then performance and progress is assessed and measured via standardized reports.

Additional details on EVM and the enterprise requirements are provided within Project Scope Management [R3], Project Cost Management [R7] and Project Schedule Management [R8].

2.6.2 At a minimum, the project manager should ensure that monitoring and controlling of project work supports the Project Management Month-End Process [Appendix D]. This process identifies the mandatory entry and review of project controls information within PMIS, and supports the project performance reporting defined in Project Communication and Stakeholder Management [R2].

2.7 Perform Integrated Change Control

Perform Integrated Change Control is the process of reviewing, approving and managing changes to deliverables, project documents, and the PMP; and communicating the decisions. The key benefit of this process is that it allows for documented changes within the project to be considered in an integrated manner while addressing overall project risk, which often arises from changes made without consideration of the overall project objectives or plans. This process is performed throughout the project.

The requirements for integrated change control are provided in the Project Integrated Change Control manual [R9]. Additional requirements related to the management and approval of contractual changes are provided in Contract Management [R10].

2.8 Close Project

Close Project is the process of finalizing all activities for the project, phase, or contract. The key benefits of this process are that the project information is archived, the planned work is completed, and the organizational team resources are released to pursue new endeavors. This process is typically performed once (at project completion), but may also occur at predefined points in the project.

2.8.1 At project closure, the project manager should review the PMP to ensure that all project work is completed and that the objectives have been met.

2.8.2 The project manager should ensure that the administrative closeout activities for the project are completed as per the Project Closure Report (PCR) [R11]. These requirements include, but are not limited to:

(a) Confirming that all documents and deliverables are up-to-date and that all issues are resolved.

(b) Ensuring any interface/configuration management requirements have been closed (e.g. work orders).

(c) Confirming that all new and updated drawings have been issued and that engineering changes have been closed.

(d) Completing (or dispositioning) regulatory actions dispositioned (as required).

(e) Confirming the delivery of the deliverables, and verification and acceptance/ validation of the scope by sponsor and customer (Operator).

(f) Ensuring the all costs are charged to the project, and that project accounts are closed.

(g) Ensuring contractual closeouts are completed as per Contract Management [R10].

(h) Ensuring financial closeouts are completed as per PCR [R11].

(i) Addressing any excess project material, and relocating any project facilities, equipment, and other resources.

(j) Confirming that all project and phase records are available and appropriately filed as per requirements detailed in Project Communication and Stakeholder Management [R2].

(k) Managing knowledge sharing and transfer, and ensure that *lessons learned* are documented and shared.

(l) Confirming that all administrative closeouts in PMIS such as EcoSys, are completed as per the requirements established in the Enterprise Project Management governance.

2.8.3 The project manager should prepare a PCR [R11] documenting the final elements:

- Final summary of the project performance – summary level description of the project
- Scope objectives – the criteria used to evaluate the scope, and evidence that the completion criterion were met
- Quality objectives – the criteria used to evaluate the project and product quality
- Schedule objectives, including acceptable schedule range, actual milestone delivery dates, and reasons for any variances
- Cost objectives, including the acceptable cost range, actual cost, and reasons for any variances
- Summary of the validation information for the final product, service, or result

2.8.4 The PCR [R11] should be approved by the sponsor.

2.8.5 During closeout phase, the project team should review and update the PIR plan [R12]. PIR activities and PIR report completion take place after closeout and include the assessment of project performance variances and benefits realization.

3.0 ROLES AND RESPONSIBILITIES

3.1 Project Sponsor

(a) Identifies and initiates the project, and prepares and/or approves the documentation for the identification and initiation phases including the initial Project Charter.

(b) Accepts the project classification level.

(c) Validates consistency of the project scope of work with the project charter.

(d) Assists the Project Manager to identify all project stakeholders.

(e) Ensures that the delivered Project meets the business objectives within the approved cost and schedule constraints.

(f) Assists the Project Manager with the resolution of project related issues including control of project scope.

(g) As part of project closeout, confirms the project delivery of scope.

(h) Develops the PIR plan [R12], ensures a PIR is conducted and results are reported to Finance and the BU, and ensures significant lessons learned are shared within the organization.

(i) Approves PCRs.

3.2 Project Manager

(a) Prepares and maintains the project charter (with Project Sponsor).

(b) Prepares and maintains the PMP.

(c) Plans and executes the full scope of project within constraints of working safely, meeting quality requirements, and performing within the approved schedule and budget.

(d) Monitors, communicates, and reports project status and recommends or approves corrective actions.

(e) Manages all project staff including contractors and controls/mitigates project risk to safety, quality, project scope, cost & schedule integration and change control.

(f) Manages project closeout including project closeout reports, post implementation review, and lessons learned.

3.3 BU Executing Line Authority

(a) Accepts the project charter.

(b) Assigns/appoints a project manager.

(c) Provides input into the level of detail to be included in the PMP and approves the PMP.

3.4 BU PMO

(a) Assists the project manager with development of PMP (as required).

(b) Assists the project manager with project monitoring and control, mitigation of project risk, safety, quality, project scope, cost & schedule integration, change control, and documenting of key Decisions.

(c) Assists the project manager with monitoring, communication, and reporting project status and recommending corrective actions.

(d) Assists the project manager with managing project closeout including project closeout reports, post implementation review, and lessons learned.

3.5 Enterprise PMO

(a) Acts as the single point of contact and subject matter expert for integration management methodologies, processes, and associated tools and templates.

4.0 DEFINITIONS AND ACRONYMS

4.1 Definitions

Cost Breakdown Structure	Is a cost allocation to the lowest level of the Work Breakdown Structure (WBS). The CBS is a breakdown of the costs of the various components of the structure including all works or services done by the vendors.
Decision	The outcome of analysis and conclusion of initiated / proposed concepts.
Governing Body	Act as primary gatekeepers and decide whether a project will pass through a given gate and proceed with the next phase of the project. The body is defined by each business unit and is comprised of key stakeholders and resources.
Lessons Learned	The knowledge gained during a project which shows how project events were addressed or should be addressed in the future for the purpose of improving future performance.
Performance Measurement Baseline	Integrated scope, schedule, and cost baselines used for comparison to manage, measure, and control project execution.
Project Charter	A document issued by the project sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.
Project Level Classifications	Determines which scale level the project shall be planned, executed, monitored and controlled, and closed out to.
Project Management Knowledge Area	An identified area of project management defined by its knowledge requirements and described in terms of its component processes, practices, inputs, outputs, tools, and techniques.
Project Management Plan	The document that describes how the project will be executed, monitored and controlled, and closed.
R1	Immediate supervisor/manager
R2	Immediate supervisor's manager (Manager once removed)

NOTE: This definition is for Project Management supporting governing documents only.

Work Breakdown Structure Is a deliverable-based hierarchical breakdown of the entire project scope used to define and group a project's discrete work elements (or tasks) in a way that helps organize, define and control the total work scope of the project.

4.2 Abbreviations and Acronyms

BCS	Business Case Summary
CBS	Cost Breakdown Structure
DR	Decision Record
DRAS	Decision Record and Analysis Summary
EPMO	Enterprise Project Management Office
ePMX	Enterprise Project Management eXtensions
EVM	Earned Value Management
OPEX	Operating Experience
PCR	Project Closure Report
PMBOK	Project Management Body of Knowledge
PMIS	Project Management Information Systems
PMO	Project Management Office
PIR	Post Implementation Review
PMP	Project Management Plan
SCR	Station Condition Record
SME	Subject Matter Expert
SPI	Schedule Performance Index
SoW	Scope of Work
WBS	Work Breakdown Structure

5.0 REFERENCES

5.1.1 Performance References

Ref #	Document Number	Document Title
R1	OPG-STD-0148	Project Management Standard
R2	OPG-MAN-00120-0017	Project Communication and Stakeholder Management
R3	OPG-MAN-00120-0011	Project Scope Management
R4	OPG-MAN-00120-0019	Project Phase Gate Management
R5	OPG-STD-0017	Organizational Authority Register (OAR)
R6	OPG-STD-0076	Developing and Documenting Business Cases
R7	OPG-MAN-00120-0012	Project Cost Management
R8	OPG-MAN-00120-0014	Project Schedule Management
R9	OPG-MAN-00120-0016	Project Integrated Change Control
R10	OPG-STD-0153	Contract Management
R11	FIN-FORM-PA-005	Project Closure Report
R12	OPG-PROC-0056	Post Implementation Review

5.1.2 Developmental References

PMBOK Guide – Project Management Body of Knowledge

Appendix A: Scalable Project Delivery Model

See latest version on *Enterprise Project Management* website

Cat.	PMBOK Ref.	Project Classification	A	B	C	D
Phase-Gating		**Plan Gate Strategy**	*Included in the Project Charter and then the PMP*			
			Determined by the Business Unit Execution Line Management and accepted by the Sponsor	Determined by the Business Unit Execution Line Management and accepted by the Sponsor	Determined by the Business Unit Execution Line Management and accepted by the Sponsor	Determined by the Business Unit Execution Line Management and accepted by the Sponsor
		Manage Phase-Gating	Gate [G1,2,3] Package - Scale A/B + Sup. Doc (PDF) Pre-Gate Project Planning Kickoff Meeting [T-12 Weeks] - Formal Package reviewed by BU PMO and PM R2 Package submitted to Governing Body	Gate [G1,2,3] Package - Scale A/B + Sup. Doc (PDF) Pre-Gate Project Planning Kickoff Meeting [T-12 Weeks] - Formal if determined by PM Package reviewed by BU PMO and PM R2 Package submitted to Governing Body	Gate [G1,2,3] Form - Scale C + Sup. Doc (PDF) Pre-Gate Project Planning Kickoff Meeting if determined by PM Package reviewed by BU PMO and PM R2 Package submitted to Governing Body	Gate [G1,2,3] Form - Scale D + Sup. Doc (PDF) Pre-Gate Project Planning Kickoff Meeting if determined by PM Package reviewed by PM R2 Package submitted to Governing Body
		Financing Interface Documents	Business Case Summary	Business Case Summary	Business Case Summary	Business Case Summary
		Monitor Phase-Gating Commitments	*See Scope Management , Schedule Management, Cost Management & Integrated Change Control*			
Integration Management	-	**Determine Project Level**	*Included in the Project Charter and then the PMP*			
			Determined by Sponsor in consultation with Project Executing Authority	Determined by Sponsor in consultation with Project Executing Authority	Determined by Sponsor in consultation with Project Executing Authority	Determined by Sponsor in consultation with Project Executing Authority
	4.1	**Develop Project Charter**	Project Charter	Project Charter	Project Charter	Project Charter
	4.2	**Develop Project Management Plan**	Project Management Plan	Project Management Plan	Project Management Plan	Project Management Plan
	4.3	**Direct and Manage Project Work**	*EXAMPLES: Daily/weekly documented work performance reviews; comparison of field progress to plan; in-depth assessments of project and commercial change requests; management of corrective actions and mitigation plans; engaging subject matter experts; maintaining an issues and action log; and engaging and motivating the project management team and stakeholders to achieve best performance.*	*Project Manager functional activities*		*EXAMPLES: Informal daily/weekly progress reviews with the vendor plus monthly formal vendor review document; informal risk, issue and action tracking.*
	4.4	**Manage Project Knowledge**	Relevant Lessons Learned Incorporated into Plan - Each Gate Lessons Learned Registered - Each Gate	Relevant Lessons Learned Incorporated into Plan - Each Gate Lessons Learned Registered - Gate 5	Relevant Lessons Learned Incorporated into Plan - Each Gate Lessons Learned Registered - Gate 5	Relevant Lessons Learned Incorporated into Plan - Each Gate Lessons Learned Registered - Gate 5
		Project Documents	*Stored in a standardized project working folder structure*			
	4.5	**Monitor & Control Project Work**	*See Communication Management , Stakeholder Management & Integrated Change Control*			
	4.6	**Perform Integrated Change Control**	*See Integrated Change Control*			
	4.7	**Close Project or Phase**	Project Closure Report (PCR)	Project Closure Report (PCR)	Project Closure Report (PCR)	Project Closure Report (PCR) - Light
		Financial Interface Documents	Post Implementation Review (PIR)	Post Implementation Review (PIR)	Post Implementation Review (PIR)	
Integrated Change Control	N/A	**Change Control Framework** [SCOPE, SCHEDULE & COST]	Change control for all material directed changes Contingency drawdown and CB/TB adj. CCF in EcoSys at WP (Control Account) Change approval as per PMP or Authorization Memo	Change control for all material directed changes Contingency drawdown and CB/TB adj. CCF in EcoSys at WP (Control Account) Change approval as per PMP or Authorization Memo	Change control for all material directed changes Contingency drawdown and CB/TB adj. CCF in EcoSys at WP (Scope Category - PIEPCCC) Change approval as per PMP or Authorization Memo	Change control for BCS Rev and/or SBCS ONLY No contingency drawdown transactions Change Log maintained by Project Manager
		Change Administration & Approval	Content Approved by PM R1 and BU PMO Tech. Check and Administered by PMO System Admin	Content Approved by PM R1 and BU PMO Tech. Check and Administered by PMO System Admin	Content Approved by PM R1 Tech. Check and Administered by PMO System Admin	Administered by PMO System Admin

Cat.	PMBOK Ref.	Project Classification	A	B	C	D
Scope Management	5.1	**Plan Scope Management**	*Included in the PMP*			
	5.2	**Collect Requirements**	Requirements Traceability Matrix	Requirements Traceability Matrix	Requirements List (included in PMP)	Requirements List (included in PMP)
	5.3	**Define Scope**	Scope of Work Document Value Engineering - as required Perform Project Definition Rating Index (PDRI) - during Definition Phase, and as required during Developmental Phase	Scope of Work Document Value Engineering - as required Perform Project Definition Rating Index (PDRI) - during Definition Phase, and as required during Developmental Phase	Scope of Work Statement (included in PMP) Value Engineering - as required	Scope of Work Statement (included in PMP) Value Engineering - as required
	5.4	**Create WBS**	WBS Hierarchy (Basis for estimating [Work Pacakge], P6 [Work Pacakge], EcoSys [**Control Account**]) WBS Dictionary	WBS Hierarchy (Basis for estimating [Work Pacakge], P6 [Work Pacakge], EcoSys [**Control Account**]) WBS Dictionary	WBS Hierarchy (Basis for estimating [Work Pacakge], P6 [Work Pacakge], EcoSys [**Cost Category**]) WBS Dictionary	WBS Hierarchy (Basis for estimating [Work Pacakge])
	5.5	**Validate Scope**	Available for Service / Return to Service Declaration / Turnover Docs Sponsor Scope Validation - Requirements Traceability Matrix	Available for Service / Return to Service Declaration / Turnover Docs Sponsor Scope Validation - Requirements Traceability Matrix	Available for Service / Return to Service Declaration / Turnover Docs	Available for Service / Return to Service Declaration / Turnover Docs
			See Integrated Change Control & Communication Management			
	5.6	**Control Scope**	*See Integrated Change Control*			
Schedule Management	6.1	**Plan Schedule Management**	*Included in the PMP based on Project Scheduling Guide*			
		Schedule Management Framework	Standard Milestones and Coding L2 Resource Loaded - **OPG P6** L3 Resource Loaded - **Vendor P6** EVM and Forecast Updates Commodity Tracking (by Project Team/Vendor) - As required Basis of Schedule Completed	Standard Milestones and Coding L2 Resource Loaded - **OPG P6** L3 Resource Loaded - **Vendor P6** EVM and Forecast Updates Commodity Tracking (by Project Team/Vendor) - As required Basis of Schedule Completed	Standard Milestones and Coding L2 - **OPG P6** Working level schedule/activity list (as required) Forecast Updates	Standard Milestone and Coding - Major Milestones Working level schedule/activity list (as required) if vendor is known
	6.2-6.4	**Define Activities, Sequence Activities and Estimate Activity Durations**	*See Project Scheduling Guide*			
	6.5	**Develop Schedule**	Level 2 Schedule Baselined - OPG P6 L3 Schedule Baselined -Vendor P6	Level 2 Schedule Baselined - OPG P6 L3 Schedule Baselined -Vendor P6	Level 2 Schedule Baselined - OPG P6	Major Milestones Baselined
	6.6	**Control Schedule**	*See Integrated Change Control & Communication Management*			
			Monthly schedule progress updates	Monthly schedule progress updates	Monthly schedule progress updates	Monthly milestones progress updates
Cost Management	7.1	**Plan Cost Management**	*Included in the PMP*			
		Cost Management Frame Work	One WP per **Control account** Separate WP for project contingency by release Separate WP for Interest by release Cost based EVM **by control account**	One WP per **Control account** Separate WP for project contingency by release Separate WP for Interest by release Cost based EVM **by control account**	One WP per **Scope Category (PIEPCCC)** Separate WP for project contingency by release Separate WP for Interest by release Cost based EVM **by Scope Category (PIEPCCC)**	One WP per **Project,** per release Separate WP for project contingency by release Separate WP for Interest by release No cost based EVM
		Funding Release Strategy	*Included in the PMP (Gate Strategy)*			
	7.2	**Estimate Costs**	*See Estimating*			
	7.3	**Determine Budget**	Cost Baselined by **Control Account**	Cost Baselined by **Control Account**	Cost Baselined by **Scope Category (PIEPCCC)**	Cost Baselined by **Project**
	7.4	**Control Cost**	*See Communication Management and integrated Change Control*			
		Forecasting	Monthly by Control Account	Monthly by Control Account	Monthly by Scope Category (PIEPCCC)	Monthly by Project
		Supply Chain / Commercial Management Integration	*See Procurement Management*			

Cat.	PMBOK Ref.	Project Classification	A	B	C	D
Estimating	N/A	**Prepare estimate**	Prepared by Estimators [PMO] in conjunction with PM based on SoW. Estimator embedded within project team as required.	Prepared by Estimators [PMO] in conjunction with PM based on SoW	Prepared by Project Manager based on competitive bid OR where a competitive bid process was not used, prepared by the Project Manager	Prepared by Project Manager
		Review Estimate	Reviewed by Estimators [PMO] [Peer Review] Estimate Classified by Estimators [PMO]	Reviewed by Estimators [PMO] [Peer Review] Estimate Classified by Estimators [PMO]	Reviewed by Project Manager Line organization (R2) Estimate Classified by Project Manager Line organization (R2)	Reviewed by Project Management Line organization (R1) Estimate Classified by Project Management Line organization (R1)
		Requirement for BOE	BOE - Prepared by Estimators [PMO]	BOE - Prepared by Estimators [PMO]	Notes and assumptions included in Supply Chain package for preferred bidder and/or Estimator Review Notes	Notes and assumptions prepared and documented by the project manager
Communications Management	10.1	**Plan Communications Management**	*Included in the PMP*			
		External/ Executive/ Board	As required	As required	As required	As required
		Published Internal Project Performance	Portfolio Report - 1 line per project [Monthly] Project Dashboard - [Monthly] Project Status Report - Written document [Monthly] * As requested by BU Line Executing Line Authority OR Sponsor	Portfolio Report - 1 line per project [Monthly] Project Dashboard - [Monthly]	Portfolio Report - 1 line per project [Monthly] Project Dashboard - [Monthly]	Portfolio Report - 1 line per project [Monthly]
		Other Communications	*EXAMPLES: Weekly project team reviews with OPG and Vendor (including minutes and recorded actions); Daily vendor timesheets, commodity and productivity reports; workshops/ surveys/ face-to-face sessions to engage stakeholders etc.*	*Project Manager functional activities*		*EXAMPLES: Weekly project team reviews with OPG and Vendor; informal discussions with stakeholders etc.*
		Reporting Cycle	**Monthly:** OPG Reporting - Safety, Quality, Schedule, Cost, Risk **Monthly:** Vendor Reporting - Safety, Quality, Schedule, Cost, Risk	**Monthly:** OPG Reporting - Safety, Quality, Schedule, Cost, Risk **Monthly:** Vendor Reporting - Safety, Quality, Schedule, Cost, Risk	**Monthly:** OPG Reporting - Safety, Quality, Schedule, Cost, Risk **Monthly:** Vendor Reporting - Safety, Quality, Schedule, Cost, Risk	**Monthly:** OPG Reporting - Safety, Quality, Schedule, Cost, Risk
	10.2	**Manage Communications**	*EXAMPLES: Preparation of written project status reports with detailed analysis and reporting of project information; Validation of key project performance information and trends; Review and approvals of communications from line management; submission of performance report to records.*	*Project Manager functional activities*		*EXAMPLES: Preparation of high level project performance summary; validation of project performance information.*
	10.3	**Monitor Communications**	*EXAMPLES: Review stakeholder communication effectiveness and update PMP as required; identify strategies and actions to evaluate, reinforce and sustain the change and desired behaviours throughout the project lifecycle and post project completion; perform self assessment of effectiveness.*	*Project Manager functional activities*		*EXAMPLES: Informally solicit feedback from stakeholders and adjust communication as necessary.*

Cat.	PMBOK Ref.	Project Classification	A	B	C	D
Risk Management	11.1	**Plan Risk Management**	*Included in the PMP*			
	11.2	**Identify Risks**	Risk Register (ePMX) Risk Identification Workshop led by Risk SME - Gates 2 & 3 Risk identification Workshop held by project team - Gate 1 Opportunity Management	Risk Register (ePMX) Risk identification Workshop held by project team Opportunity Management	Risk Register (ePMX) As determined by Project Manager	Risk Register (Project File) As determined by Project Manager
	11.3	**Perform Qualitative Risk Analysis**	Risk Score as per Probability and Impact Matrix	Risk Score as per Probability and Impact Matrix	Risk Score as per Probability and Impact Matrix	Determine High, Medium, Low probable risk impact
	11.4	**Perform Quantitative Risk Analysis**	Risk Quantification Cost Contingency Modeling by Risk Management [PMO] Schedule Contingency Modeling by Risk Management [PMO] - Optional at Gate 2; Required at Gate 3 Contingency Annual Refresh via Modeling after Gate 3 or when there are significant changes	Risk Quantification Cost Contingency Modeling by Risk Management [PMO] Schedule Contingency via Project Team Assessment Contingency Refresh via Modeling (as required)	Risk Quantification Cost Contingency via Expected Monetary Value [EMV] by Project Team Schedule Contingency via Project Team Assessment	Cost Contingency via BCS Writing Guidance Schedule Contingency via Project Team Assessment
	11.5	**Plan Risk Responses**	Risk Register (ePMX) - Link to Issues / Actions	Risk Register (ePMX) - Link to Issues / Actions	Risk Register (ePMX) - Link to Issues / Actions	Risk Register (Project File) - as required
	11.6	**Implement Risk Responses**	*Project Manager functional activities*			
	11.7	**Monitor Risks**	*See Communications (Project Team Reviews)* Risk Review as per PMP Monthly Risk Review Meeting by Risk SME Included in Portfolio Risk Reviews (ex. Risk Oversight Committee)	Risk Review as per PMP Quarterly Risk Review Meeting by Risk SME Included in Portfolio Risk Reviews (ex. Risk Oversight Committee)	Risk Review as per PMP Semi-annual risk review meeting by Risk SME Project Working Team Reviews	Project Working Team Reviews
Stakeholder Management	13.1	**Identify Stakeholders**	*Included in the PMP* *EXAMPLES: Identify stakeholders through formal brainstorming sessions, lessons learned reviews etc.; Analyze and document relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success etc.*	*Project Manager functional activities*		*EXAMPLES: Identify stakeholders based on Project Team knowledge and experience; document in PMP.*
	13.2	**Plan Stakeholder Engagement**	*Included in the PMP* *EXAMPLES: Monthly formal status reports and periodic face-to-face and job site walk downs for key stakeholders with high influence and interest; formal training and qualification.*	*Project Manager functional activities*		*EXAMPLES: Email status updates*
	13.3	**Manage Stakeholder Engagement**	*EXAMPLES: Work with Stakeholders to address their needs and expectations, address issues and foster stakeholder engagement.*	*Project Manager functional activities*		*EXAMPLES: Inform and instruct stakeholders on changes.*
	13.4	**Monitor Stakeholder Engagement**	*EXAMPLES: Confirm information received and understanding; assess stakeholder satisfaction through discussions, surveys and self assessments; Identify any new stakeholders and change in existing stakeholder engagement etc.*	*Project Manager functional activities*		*EXAMPLES: Informally solicit feedback from stakeholders and adjust communication as necessary; identify any new stakeholder etc.*

Appendix B: Project Level Classification

B.1.0 PROJECT LEVEL CLASSIFICATION OVERVIEW

All projects should be classified to a project level based on the project's complexity and anticipated cost at completion. *Project level classification* determines which scale the project shall be planned, executed, monitored and controlled, and closed out to.

B.2.0 PROJECT LEVEL CLASSIFICATION STEPS

Step 1: Determine Project Complexity: For each of the six criteria, rate the project complexity (1 to 4). If more than one complexity level applies for any criteria, the higher level should be used. Determine the total project complexity score by adding the ratings in each criteria.

Table 1: Determine Project Complexity

Determine Project Complexity Level

- For Each of the Six (6) Criteria, Determine Complexity Level (Total of Criteria Scores)

Criteria Score	Project Type	Experience (Executing Organization)	Interfaces (with Other Departments and/or Vendors)	Technology	Integration	Safety, Environment & Regulatory
4	Project/Modification Requiring a Station/Unit Outage or an Operations Software/System Development IT Project	Similar Projects Rarely or Never Executed	Complex Interfaces for Major Scope of Work Requiring Significant Coordination and Oversight	First-of-a-Kind/ First-in-a-While Technology	Very Compressed Schedule Constraint with Significant Enterprise Consequences	Significant
3	New Construction	Similar Projects Only Occasionally Executed	Non-Routine Interfaces for Major Scope of Work Requiring a High Degree of Coordination	First-of-a-Kind/ First-in-a-While in OPG	Compressed Schedule Constraint with High Consequences; Integration with Major Project or Outage Critical Path	High
2	Construction not Requiring a Station/Unit Outage	Similar to Some Projects Executed	Multiple Routine Interfaces	Complex, but Mature Technology/ Application	Schedule Constraint with High Consequences; Integration with Major Project or Outage Pre-Requisite(s)	Moderate
1	Business Software/System Development IT Project, or Engineering/Design-Only & Procurement-Only Projects	High Volume of Similar Projects Executed	Little or No Interfaces	Routine Technology / Application	No Schedule Constraint; No Integration with Major Project	Little or None
Complexity Level	Criteria Score					

Table 2: Project Level Classification Matrix

Step 2: Estimate Project Total Cost: Determine the projects estimated total cost at completion of the project (including contingency). It is recognized that the estimated total project cost during the initial phases of a project may equate to a range due to the level of scope definition.

Step 3: Determine the Project Level: Classify the project level (A, B, C or D) based on the complexity and estimated project total cost as per Table 2.

Complexity Level		$200K - $5M	$5M - $20M	>$20M
16 or More	High \ Very High	C	B	A
15 or Less	Low \ Moderate	D	C	B

Estimated Project Total Cost

Appendix C: Integration of Knowledge Areas

Knowledge Areas	Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
Integration Management	Develop Project Charter	Develop Project Management Plan	Direct and Manage Project Work Manage Project Knowledge	Monitor and Control Project Work Perform Integrated Change Control	Close Project or Phase
Scope Management		Plan Scope Management Collect Requirements Define Scope Create WBS		Validate Scope Control Scope	
Schedule Management		Plan Schedule Management Define Activities Sequence Activities Estimate Activity Durations Develop Schedule		Control Schedule	
Cost Management		Plan Cost Management Estimate Costs Determine Budget		Control Costs	
Quality Management		Plan Quality Management	Manage Quality	Control Quality	
Resource Management		Plan Resource Management Estimate Activity Resources	Acquire Resources Develop Team Manage Team	Control Resources	
Communications Management		Plan Communications Management	Manage Communications	Monitor Communications	
Risk Management		Plan Risk Management Identify Risks Perform Qualitative Risk Analysis Perform Quantitative Risk Analysis Plan Risk Responses	Implement Risk Responses	Monitor Risks	
Procurement Management		Plan Procurement Management	Conduct Procurements	Control Procurements	
Stakeholder Management	Identify Stakeholders	Plan Stakeholder Engagement	Manage Stakeholder Engagement	Monitor Stakeholder Engagement	

Appendix D: Project Management Month-End Process

ONTARIO POWER GENERATION

Month-End Reporting Schedule - October 2020

ONE OPG

ID	Business Units	Accountable	Day	M	T	W	Th	F	S	S	M	T	W	Th	F	S	S	M	T	W	Th	F	S	S	M	T	W	Th	F	S	S	M	T
			Date	26	27	28	29	30	-	-	02	03	04	05	06	-	-	09	10	11	12	13	-	-	16	17	18	19	20	-	-	23	24
1	All Business Units		Fiscal Month End Close																														
2	All Business Units	Project Teams / Finance	Provide Accruals and Verify																														
3	Nuclear Refurbishment	Project Teams	EcoSys Change Submission Freeze (draft changes can still proceed)																														
4	All Business Units	Project Teams	Schedules Updated in P6 (by 12:00 pm)																														
5	All Business Units	Program / EPMO	Reconcile FRA/EcoSys Actuals (12:00 pm)																														
6	Nuclear Refurbishment	Project Teams	Update Contingency inputs in ePMX																														
7	Nuclear Refurbishment	Project Teams	Update Cost Forecasts in EcoSys																														
8	All Business Units*	Project Teams	Update Cost Forecasts in EcoSys (NR excluded)																														
9	Nuclear Refurbishment	Project Teams	Generate Earned Value in EcoSys (post forecast update)																														
10	Nuclear Refurbishment	Project Teams	Forecast Review and Corrections (if required)																														
11	Nuclear Refurbishment	Project Teams	Prepare Variance Explanations																														
12	Nuclear Refurbishment	Project Teams	Generate Earned Value in EcoSys (if EAC has changed)																														
13	Nuclear Refurbishment	Program	Forecast Interest and Contingency (by 12:00 pm)																														
14	Nuclear Refurbishment	EcoSys Administrator	Take Final Snapshots and Push Data to MSBI																														
15	Nuclear Refurbishment	Reporting	Publish Final MSBI Reports																														
16	Nuclear Refurbishment	Project Teams	EcoSys Change Submission can Resume																														
17	All Business Units*	Project Teams	Generate Earned Value in EcoSys (post forecast update) (NR excluded)																														
18	All Business Units*	EcoSys Administrator	Take Final Snapshots and Push Data to MSBI (NR excluded)																														
19	All Business Units	EcoSys Administrator	Period Close (at EOD)																														
20	All Business Units	Reporting	Publish Final MSBI Reports																														
		Business Days				0	1	2			3	4	5	6	7			8	9	10	11	12											

EXAMPLE

Legend	Non business day	All Business Units	Nuclear Refurbishment