Manage Project

Process Specification

PRCS-80

Issue: 5

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Independent Electricity System Operator

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Document Change History

Issue	Reason for Issue	Date
Issue	Reason for Issue	Date
1.0	First Release	July 24, 2009
2.0	Updated to reflect new PPMLC	October 25, 2019
3.0	Updated to remove business goals in the document	March 4, 2021
4.0	Updates based on SDLC Process Review Engagement: clarified interactions with SDLC and required SDLC roles for SDLC Scoping.	Aug 9, 2024
5.0	Revised to incorporate improvements identified through the lessons learned initiative, the PPM Tool project, and roles introduced in the Enterprise Governance Cycle.	May 22, 2026

Table of Contents

List of Figures

No table of figures entries found.

List of Tables

1. Introduction

1.1 Purpose and Scope

1. The purpose of this document is to define the business process called "Manage Project".
2. This document describes the triggers, controls, service levels and results of the "Manage Project" process. These are the requirements of the process. This document also defines the process design by listing the tasks to be performed, the flow of activity between tasks, and the roles accountable and responsible for each task.

1.2 Authority

3. All staff are expected to comply with this process as per the *IESO Code of Conduct*.
4. Process ownership is defined in the *Process and Information Management Policy*. The process owner may delegate day-to-day responsibility for the process to one or more process stewards.
5. The process owner for the "Manage Project" process is Director, Enterprise Project Delivery. The process owner delegates process stewardship to Supervisor, Enterprise Project Management Office (EPMO).

1.3 Assumptions and Limitations

6. The process design is not intended to address all possible exceptions which may occur except where explicitly required to implement a process control, or where the exception is thought to occur 20% or more of the times the process is exercised. Other, less frequently occurring exceptions should be handled consistent with this process specification. If undocumented exceptions occur 20% or more of the time after the process is implemented, this document should be updated with the standard process flow for this exception.
7. The "Manage Project" process will not check upstream processes for quality or completeness. The trigger from upstream processes will be assumed to be of the necessary quality and completeness. Inconsistencies shall be reported to the process steward of "Manage Project" for resolution.
8. A project may be put on-hold or cancelled on an exception basis.
9. Lessons learned may be captured throughout the project lifecycle, across all project phases from initiation to closing. As activities such as Administer Exception and Cancel Project occur within these phases, lessons learned related to these activities are not explicitly shown in the process model.

– End of Section –

2. Process Requirements

2.1 Process Scope

10. This process manages all IESO formal projects after ranking through closure, cancellation or withdrawal. This includes project planning, securing project charter approval, monitoring, reporting, project exception handling and project record keeping.

2.2 Process Results

11. When complete, the successful process will have provided the following:

    a. All business objectives, approved through the charter or modified through an exception, of the project have been met;

    b. All the deliverables of the project have been completed and accepted;

    c. Exceptions to the original project, if any, have been documented and approved;

    d. The project has been completed and closed and lessons learned captured; and

    e. All project artifacts filed appropriately.

2.3 Process Triggers

12. Each business process has one or more triggers – entry points into the process. Each trigger leads to a process thread – a pathway through the process. The following table describes the possible business events and the associated triggers. Note that some business events trigger processes other than "Manage Project". These business events are included to illustrate what is and is not in scope of the process.

Table 2-1: Business Events & Triggers

Business Event	Business Process	Trigger
A project, which has been approved to be included in the current year portfolio by the Enterprise Portfolio Planning Council (EPPC) through the Prioritize Project Process, is scheduled to start.	"Manage Project"	"Per portfolio start date"
The scheduled lessons learned review period occurs in accordance with the project's lessons learned capture schedule.	"Manage Project"	"Per lessons learned review schedule"

Business Event	Business Process	Trigger
A project situation indicates that lessons learned should be captured and documented.	"Manage Project"	"Identified need to capture lessons learned"
Routine project governance monitoring occurs.	"Manage Project"	"Continuously"
The scheduled PSC meeting occurs.	"Manage Project"	"Per PSC meeting schedule"
A project matter requiring a decision from the PSC is identified.	"Manage Project"	"PSC decision required"
An exception for a project is identified.	"Manage Project"	"Administer exception"
The project manager formally advises that the project should be cancelled or deferred.	"Manage Project"	"Project manager advises cancelling or deferring project"
Approved project portfolio decision to cancel, place on hold or defer the project.	"Manage Project"	"Sponsor informed of decision to cancel project by EPPC"

2.4 Process Context

13. Refer to the Process Group Map "MDL_48 Change Enterprise" to see the relationships between process "Manage Project" and other processes within this process group.

2.5 Risks and Controls

14. Controls are constraints on the design of the process which mitigate risk to the IESO and its mandate.

15. **Risk** is the possibility that an event will occur and adversely affect the achievement of objectives. Process risks are events that could prevent an activity from being accomplished as intended.

16. **Controls** are considered enablers to the achievement of the objectives within the desired performance target. Further, they help ensure that necessary actions are taken to address risks to achievement of objectives, are the specific activities that help ensure management directives are carried out, and occur throughout the organization, at all levels and in all functions.

Risk: 1 **Project managers, sponsors, project steering committees and project teams lack awareness of the Portfolio and Project Management Lifecycle (PPMLC) are not trained and or experienced with the Manage Project Process and are unable to adhere to it.**

Control: 1 EPMO will provide formal training to all project managers on the PPMLC including the Manage Project process. Refresher training will also be provided on an as required basis to ensure project managers have a strong understanding of the PPMLC

Control: 2 EPMO will develop and maintain presentation templates, quick reference guides, manuals, samples and other training material to assist the project manager to educate their project sponsors, project steering committees and project teams on the PPMLC. In addition, an overview of the PPMLC will be include at every kickoff meeting to ensure key stakeholders and resource managers are familiar with the process.

Risk: 2 **Project manager, sponsor, project steering committee and project team do not have project management training and or experience and are not able to execute the tasks outlined in the Manage Project Process effectively.**

Control: 3 Job documents for Project Managers within Enterprise Project Delivery, operating at the MP4 and MP5 requires project managers obtain the PMI Project Management Professional (PMP) certification. The PMP certification requires project managers to have at minimum completed 4500 hours of leading and directing projects which will provide a solid foundation of how to execute the "Manage Project" process tasks.

Control: 4 Enterprise Project Delivery will periodically arrange group training for the development of core project management skills and will encourage staff to attend these training opportunities.

Control: 5 The project manager and or the EPMO will provide an overview of the Roles and Responsibilities document to the PSC, sponsor and project team. This may be done during the project kick-off meeting or through one-on-one sessions as, and when, needed.

Risk: 3 **Project managers do not have the tools, templates or guides to effectively manage their projects through the Manage Project Process.**

Control: 6 Enterprise Project Delivery has provided a suite of tools, templates, guides and samples on the EPMO web-page to support project managers in completing the tasks and deliverables in the "Manage Project" process. The EPMO provides on-going support and training on how to use these tools.

Control: 7 Project managers will have access to a continuous improvement log to suggest improvements to the process, tools, templates and guides posted on the EPMO web-page. The EPMO will regularly monitor this log and implement continuous improvement ideas that have been approved by the Enterprise Project Delivery Management team.

Risk: 4 **Project sponsor or PSC members may not support the "Manage Project" process or find it too time consuming and choose not to adhere to it.**

Control: 8 Project managers are expected to inform the EPMO if the project is not adhering to the "Manage Project" process. The Enterprise Project Delivery Management team will inform the sponsor and project's approving authority of the potential risks of not adhering to the process and escalate further, if required.

Control: 9 The EPMO prepares the Project Portfolio Dashboard Report (PPDR) on a monthly basis, which indicates project health, including adherence to the project management process. Any instance of non-adherence is appropriately flagged and raised to the attention of the IESO`s leadership team.

Control: 10 At the start of every project, the Project Sponsor, Project Manager and members of the Enterprise Project Delivery Management team agree on what controls will be employed for the project and these can be scaled appropriately to address project complexity and risk.

Risk: 5 **Project progress reporting does not accurately reflect the project's health and status.**

Control: 11 PSC members, who represent key stakeholders, review progress reports at least monthly and identify any issues or concerns to the Project Manager and Enterprise Project Delivery Management team as required.

Control: 12 The EPMO prepares monthly consolidated project reports based on information provided by the project managers for all active projects. The EPMO validates all reports using the monthly PSC progress report as a reference document. Any instances of deviation are investigated further with the Project Manager and flagged as required.

Risk: 6 **Maintenance of multiple versions of the project charter and integrated project plan leads to records management issues and increase the complexity of governance.**

Control: 13 Citadel will be used to approve and store all control documents. As part of the citadel approval workflow the EPMO will be notified of project charter and or integrated project plan approvals. The EPMO will link the latest control document in the reporting repository and update the project's baseline in the Project and Portfolio Management tool.

Risk: 7 **While approving project exceptions the sponsor exceeds their approving authority.**

Control: 14 The EPMO will review all exception reports for completeness and governance. During the review the EPMO will confirm that the appropriate approving authority has been listed as the approver of the exception report.

Risk: 8 **Capital and human resources are not available to support the tasks in the manage project process.**

Control: 15 The EPMO office will collect from the Project Managers resource utilization and capital forecast estimates on a monthly basis from all projects in the portfolio and meet with resource managers on a quarterly basis to confirm resource availability. This information will be used to escalate resourcing issues early and make adjustments to the portfolio as required.

Control: 16 Project Managers will escalate to the Senior Manager, Change Delivery any new or ad hoc resource change throughout the project lifecycle where delivery is impacted. This information will be used to escalate immediately with resource managers.

2.6 Service Levels

17. Service levels describe characteristics of the process which need to be met for this process to be considered a success.

a. 80% of projects must meet their business objectives within approved time and cost (guideline).

b. Task “Assign initial team” must be done at least 2 weeks prior to the project’s planned start date which occurs during task “Confirm project outline” (guideline).

c. Initiation phase (i.e. approved project charter) is completed within 4 to 6 weeks of confirming project outline (kickoff meeting) (guideline)

d. Project closure phase is completed within 4 weeks of the acceptance of the project deliverables (guideline)

e. All “Review” tasks in the EPMO swim lane are completed within 3 business days of receiving the project artifact (guideline)

f. All “Administer”, tasks in the EPMO swim lane completed within 3 business days of the request (guideline).

2.7 Key Performance Indicators

18. Not applicable

– End of Section –

3. Process Description

3.1 Roles

19. A role is a person, group of people, or computer system that performs or is responsible for work done in the process. The roles are not intended to be job positions as seen in job postings. The roles define a set of responsibilities to perform duties and tasks that require specific skills and knowledge. Roles are defined in such a way as to make them re-useable in other processes.

20. The process identified the following roles:

Table 3-1: List of Roles

Role	Description
Project Team	The project team refers to a group comprising of the business and system analysts, subject matter experts (SME's), vendors, contractors and consultants assigned to the project or engaged on the project through contract services. The composition of the project team may change throughout the life of the project, depending upon the project work to be done. Individuals supporting the project can have multiple roles on the project, for example, when providing input into the project charter as a SME the sponsor is acting as part of the Project Team. The project team brings the skills and expertise needed to manage and complete the project.
Project Manager	Project Managers have skills and expertise in planning, budgeting, scheduling, and directing the efforts of the project team towards the accomplishment of the project's business objectives.
Project Steering Committee	Project Steering Committees are comprised of members nominated by the Project Sponsor. They have the skills, experience and seniority to provide strategic direction to the project, represent the direct stakeholders and remove barriers to the project's success.
Project Sponsor	Project Sponsors are champions of a project/program and are accountable for ensuring the project achieves its stated objectives in partnership with the Project Manager
Approving Authority	The Approving Authority has the appropriate signing authority as defined in the IESO's Organizational Authority Register (OAR).
Enterprise Project Management Office (EPMO)	The EPMO is comprised of a team of individuals, not directly involved in the project itself, who provide support to ensure adherence to the project management methodology.
Enterprise Project Delivery Leadership	Enterprise Project Delivery Leadership is comprised of the following positions: Director, Enterprise Project Delivery and his/her direct reports.

Role	Description
Enterprise Portfolio Planning Council (EPPC)	The EPPC consists of senior leadership, director level or higher, who represent all business units at the IESO. EPPC members are nominated by the "Prioritize Project" process owner and approved by the appropriate Business Unit Leaders.
Enterprise Change Control Board (ECCB)	The ECCB is the subset of EPPC governs in-flight changes with enterprise implications and enables timely decision making while preserving overall portfolio integrity. ECCB operates under formal delegated authority from EPPC and escalates changes to EPPC when needed.
Advisor, Financial Planning & Analysis	Advisors, Financial Planning & Analysis are members of the Finance department who have the skills and experience to create and release activity codes and provide capitalization guidelines.
Business Analyst	Business Analyst has expertise in facilitating, eliciting and securing approval of project business objectives, performance measures, business process and business solution designs.
Resource Manager	Resource managers are line managers or supervisors who assign resources to the project.
Stakeholders	Stakeholders are individuals or groups that are directly and indirectly impacted by the project. Stakeholders can have positive and negative influence on the projects outcomes and often need to be informed of the project, provide inputs into the project and be consulted on the development of the business solutions. Example of stakeholders include: solution owners, resource managers, internal and external customers, and regulating bodies.

3.2 Tasks

Note: For simplicity, tasks that occur in multiple project phases will only be described the first time they occur.

Table 3-2: List of Process Tasks

Task	Responsible Role	Description
Initiate Project		
Assign initial team	Enterprise Project Delivery Leadership	The Enterprise Project Delivery Leadership will assign a Project Manager. A Business Analyst role and Solution Architect role will also be assigned, to facilitate SDLC impact assessments for the project (in tasks "Outline project" and "Refine project" below). The Project Manager, Business Analyst and Solution Architect will be provided with the Business Case and other relevant documents to provide background on the project.
Request project setup	Project Manager	The project manager follows EPMO work procedure "Administer Project" to ensure that all administrative tasks are completed.
Setup project	Enterprise Project Management Office	Upon receipt of the project registration and directory setup request from the project manager, the assigned EPMO staff will: review the information provided for completeness; set up a project directory with Read/Write access for project manager and all the project team members listed on the form; update the Project Repository with the preliminary project information (i.e. register the project).

Task	Responsible Role	Description
Outline project	Project Manager	The initial project team will hold discovery sessions with the sponsor and selected stakeholders to solidify their understanding of the project's background, objectives and constraints. The initial project team will identify high-level "In Scope" and "Out of Scope" business elements, key stakeholders (including resource managers and potential PSC members), and initial indications for budget and duration. Lessons learned from similar projects should be reviewed during this time to provide additional insight into planning and outlining the project. The initial project team will engage the SDLC Concept Stage processes ("Define Business Architecture & Design" – BA as lead, "Define Business Needs & Requirements" – BA as lead, " Define IT Solution Architecture & Design" – SA as lead) to obtain the high-level "In Scope" and "Out of Scope" architectural components and perform an SDLC initial impact assessment. The initial project team (typically BA/SA) may also consult with members of the Architecture Review Board (ARB) as needed, for any enterprise architecture impacts. Once the project has been outlined, the project manager will prepare the Kickoff Meeting agenda deck using the latest template posted on the EPMO site and engage the EPMO for support and guidance. Note: Kick-off meetings are typically held within 2 -3 weeks of PM/BA/SA assignment date.
Activity: "Engage SDLC"	Project Team	Engage processes from the SDLC business function.
Activity: "Engage Partner Processes"	Project Team	Engage partner processes, which includes: Procure Goods and Services, Amend Market Rules (undocumented), Interpret Market Rules (undocumented), Conduct IESO Engagement, Issue Policy (undocumented), Baseline Documents.

Task	Responsible Role	Description
Confirm project outline	Project Manager	The project manager will facilitate a Kickoff meeting to formally initiate the project and secure sponsor and key stakeholder consensus on project objectives, high-level scope, initial risks, project delivery approach and project governance. During the kickoff meeting the project manager should confirm resource availability to develop the project charter from the resource managers. Resource commitment for the subsequent phases of the project should be obtained through the initial, and subsequent, versions of the Project Charter. Note: The Kickoff meeting marks the formal start of the project and project teams should target to complete the Project Charter within 4-6 weeks of this date.
Nominate project steering committee	Project Sponsor	The project sponsor will select or nominate a project steering committee (PSC) for the project representing all direct stakeholders. For details on formation of a steering committee refer to the Project Management Guide (IESO_GDE_0234).
Accept nominations	Project Steering Committee	The individuals nominated by the project sponsor will each formally accept the nomination or, in case of their unavailability, suggest an alternative.
Conduct PSC meeting	Project Manager	The project manager secures decisions and direction from the project steering committee (PSC) required to direct the project and manage risks and issues. The project manager will prepare and facilitate the PSC meetings on a monthly basis using the standardized progress report template (as a minimum) and any other supporting materials, as required. It is recommended to include an agenda if additional materials will be discussed or presented at the meeting. All proceedings, action items and decisions of the PSC should be recorded in the minutes of the meeting and the RAID. PSC meetings will, as a minimum include; deliverable status, milestones achieved, actual expenditures, risks identified or triggered and decisions required. During the Planning Phase, the project manager should provide the PSC with a high-level milestone schedule of activities that will be completed during the planning phase to provide increased visibility of progress and allow for greater governance and oversight of the project. Planning milestones should be shared with the PSC within 1 month of entering planning.

Task	Responsible Role	Description
Obtain project team	Project Manager	The project manager will identify and secure the relevant subject matter experts (SME's) to define and plan the project. This includes negotiating with the respective resource managers to ensure the availability of resources to contribute to the development of the Project Charter. The project manager will orient project team members to the project and inform them of the projects objectives, high-level scope, initial risks, project delivery approach and project governance.

<table>
<tr>
<td>Refine project</td>
<td>Project Team</td>
<td>The project team will begin to engage all key stakeholders (for example: project sponsor, impacted Process SMEs, impacted IT SMEs, QA, Procurement and InfoSec) to refine the project. I.e. Refine or define:

business objectives for the project;
alignment of the project to enterprise strategy, objectives and priorities;
stakeholders, both internal and external;
the scope, schedule and cost for the overall project and the detailed scope, schedule and cost to complete the planning phase of the project;
the procurement needs
initial work breakdown structure
initial project plans required to support the initiation and planning phase of the project.
the overall project delivery approach including the procurement and QA strategy; and
potential risks, quality assurance activities and controls, as well as assumptions and constraints.

The project team will engage the SDLC Concept Stage processes (“Define Business Architecture & Design” – BA as lead, “Define Business Needs & Requirements” – BA as lead, " Define IT Solution Architecture & Design” – SA as lead) to refine the high-level “In Scope” and “Out of Scope” architectural components, refine the SDLC impact assessments and to provide input into the detailed scope of the project.
When engaging the SDLC, the business analyst should ensure impacted business architecture stakeholders are consulted (e.g. Process SMEs, process steward, process owner, Enterprise Business Architect), and the solution architect should ensure impacted IT solution architecture stakeholders are consulted (e.g. IT domain SMEs, Information Security, Quality Assurance, Enterprise Solution Architect).</td>
</tr>
</table>

Task	Responsible Role	Description
		If there are anticipated SDLC impacts, the business analyst will prepare a business architecture/requirements approach for the project, and the solution architect will prepare an IT solution architecture approach for the project. The project team (typically BA/SA) may also consult with members of the Architecture Review Board (ARB) as needed, for any enterprise architecture impacts. If the project involves the SDLC, the project manager will engage a QA lead. The project team should consult with the project sponsor and PSC to confirm the proposed business objectives for the project and understand any concerns or constraints from the project sponsor or PSC. These objectives, concerns and constraints may impact the proposed design, schedule and budget included in the project charter.
Develop schedule	Project Manager	The project manager will identify and sequence the tasks required to deliver the project. The sequence of tasks and duration to complete each task should be validated by the project team and appropriate contingency amounts included to address the residual risks and timing uncertainty.
Develop budget	Project Manager	The project manager will develop the budget required to deliver the overall project. Cost estimates should be validated by the project team and appropriate contingency amounts included to address the residual risks and estimation uncertainty. For projects expecting to use only a single version of the Project Charter, budget accuracy for the overall project should be in the order of +/- 20%. For projects planning to use multiple versions of the Project Charter, budget, accuracy for the overall project should be in the order of +/- 50% and planning phase should be in the order of +/- 20%.

Task	Responsible Role	Description
Draft project charter	Project Team	With input from the project team, project sponsor, and lessons learned from similar projects, the project manager and business analyst will draft the Project Charter which will be used to commit resources, approve overall project budget and schedule and allow the project to move into the Planning Phase. The target timeframe to complete the Project Charter is 4-6 weeks from the project Kickoff meeting. The project team reviews and provides feedback on the Project Charter during this task.
Perform completeness review of project charter	Enterprise Project Management Office (EPMO)	The EPMO will review the Project Charter for quality, completeness and alignment to EPMO processes. The EPMO will validate that the approving authority on the charter has the appropriate authority to approve the funds being requested. As required, the EPMO will engage the Enterprise Project Delivery Management team and the Director, Corporate Finance to review the charter and ensure sufficient capital funds are available. The EPMO and the Project Team will also engage other Project Charter content reviewers, such as business lead, IT, procurement, lead Enterprise Architect, Finance (as per the Project Charter Template Guide). The review may cause the process to loop back to the previous task for more clarity, information or refinement. Once the review is complete the EPMO will recommend that the Project Charter be submitted to the project sponsor and PSC for approval.
Revise project charter	Project Manager	Based on the review comments and feedback provided by the project team, the EPMO, and the Project Charter content reviewers, the project manager, business analyst and solution architect will update and complete the Project Charter before submission to the PSC for their review.
Ratify project charter	Project Steering Committee	The project steering committee (PSC) will review the Project Charter for alignment to business objectives. The review may cause the process to loop back to the previous task for more clarity, information or refinement. When the PSC is satisfied it will recommend the Project Charter for sponsor approval.

Task	Responsible Role	Description
Obtain approval of project as per the OAR	Sponsor	The sponsor will approve the project via the Project Charter and notify the project manager and EPMO. Where they have sufficient authority as per the Finance Policy, the sponsor will approve the overall project budget and schedule, and authorize the project to proceed into the Planning Phase. If the sponsor does not have the appropriate authority to release the project's budget, an additional approval authority is required. It is the responsibility of the sponsor to seek this additional approval. On approval, The EPMO will request the appropriate capital activity code(s) for the project from the advisor, financial planning and analysis and provide them to the project manager. The project will proceed to the planning phase following the approval of the project charter. Note: the approval will be formally documented in Citadel.
Document lessons learned	Project Manager	The project manager works with the project team to identify and document relevant lessons learned in the Initiation Phase, and file them in the records management system.
Plan Project		
Mange project schedule	Project Manager	The project manager will continuously maintain and update the project schedule as tasks are identified, defined, assigned, and completed. Schedule changes will be communicated and vetted by the project team. Note: Tasks should at a minimum include; the task description, resources required, the dependencies, effort and the estimated start and end date.
Monitor project progress	Project Manager	The project manager will compare actual progress to planned progress to address deviations to approach, budget, and schedule. The project manager will address any deviations from planned benefits, project scope and quality. The project manager will identify, log, track, and manage project issues and execution-level interdependencies on an ongoing basis, assessing their impacts and coordinating corrective actions as required. If the project manager identifies deviations which results in one or more KPI's being reported as red, an exception report may be required.

Task	Responsible Role	Description
Manage project risks	Project Manager	The project manager works with the project team to identify and manage risk impacts on the project, including both potential threats and opportunities. This includes maintaining the risk register, identifying and developing mitigation plans, implementing pre-defined mitigation plans, and releasing contingency back to the portfolio if risks have passed.
Manage communication	Project Manager	The project manager will regularly report on the progress of the project to the project steering committee, project team, key stakeholders and resource managers. The message, medium and frequency of communication should be outlined in the Communication Plan. In addition to the Project Progress Report, the project manager will also prepare capital forecast and resource demand plans that will be used by the EPMO to prepare consolidated portfolio reports for management.
Activity "Administer Project Exception"	Project Manager	If one or more project constraints (cost, time, objectives) are expected to exceed approved limits, the project manager will take appropriate steps to administer a project exception. For details see tasks below and EPMO's "How to Guide – Exception Report"
Refine business objectives	Project Team	The project team will build upon the objectives identified in the Initiation Phase and develop specific, measurable, achievable, relevant and time-bound (SMART) objectives and performance measures. These objectives will be used to measure the success of the project.
Refine project deliverables	Project Team	The project team, with input from key stakeholders, will determine all the deliverables which, when completed, will meet the business objectives. Acceptance criteria for each deliverable will be defined to ensure that the quality aspects of a deliverable have been met. This information will be documented in the Integrated Project Plan. Note: SDLC and Partner Processes will need to be engaged to determine the full scope of the project and design of the solution.
Develop integrated project plans	Project Manager	The project manager, with the project team and stakeholders, will develop the required integrated project plan elements needed to successfully plan and deliver the scope of the project and achieve the stated business objectives. Common elements of the project that should be planned include, but are not limited to: Budget, Schedule, Communication, Human Change Management, Change Management, SDLC Activities and Quality Assurance/Testing. Most plans will feed into each other and will be developed in parallel.

Task	Responsible Role	Description
Refine budget estimate	Project Manager	Through progressive elaboration, the project manager will take all the detailed cost estimates provided by the project team, and/or vendor and revise the initial budget to reflect the most accurate cost estimate to complete the project. These estimates should be detailed and reflect the resources (people, equipment and materials) and duration required to complete the work.
Refine schedule estimate	Project Manager	Through progressive elaboration, the project manager will take all the detailed effort and duration estimates provided by the project team, and/or vendor and revise the initial schedule to reflect the most accurate schedule estimate to complete the project. The estimates should be detailed and reflect the resources people, equipment and materials to complete the work.
Review integrated project plan	Project Team	The project team will review the integrated project plan content for completeness and accuracy. The review process is iterative and may loop back to the project manager or others for more information or clarity. The project team must inform the sponsor and key stakeholders of key plan elements before seeking formal reviews or approvals.
Perform completeness review of integrated project plan	Enterprise Project Management Office (EPMO)	A member of the EPMO team will review the project plan to for quality, completeness and alignment to EPMO processes.
Revise integrated project plan	Project Manager	Based on the review comments and feedback provided by the project team and/or the EPMO, the project manager will update and complete the project plan before submitting to the project steering committee for their review.
Ratify integrated project plan	Project Steering Committee	The project steering committee will review the plan. The review process is iterative and may loop back to the project manager for more information, clarity and/or suggested changes. When satisfied with the contents of the plan, the project steering committee will recommend the Integrated Project Plan be approved by the sponsor. If the project requires an updated version of the Project Charter in order to obtain the approved funding and schedule to proceed into the execution phase, then the project manager will update the Project Charter accordingly. Note: The Integrated Project Plan must be reviewed and approved prior to starting the execution phase of the project.

Task	Responsible Role	Description
Update project charter	Project Manager	If required, the project manager and business analyst will update the Project Charter's budget, schedule or business objectives based on the progressive elaboration that occurred in the planning phase as documented in the ratified Integrated Project Plan.
Review updated project charter	Project Team	The project team will review the revised Project Charter content for completeness and accuracy. The review process is iterative and may loop back to the project manager or others for more information or clarity. The project team must inform the sponsor and key stakeholders of key Project Charter elements before seeking formal reviews or approvals.
Perform completeness review of updated project charter	Enterprise Project Management Office (EPMO)	The EPMO will review the revised Project Charter for quality, completeness and alignment to EPMO processes. The EPMO will validate that the approving authority on the Project Charter has the appropriate authority to approve the capital being requested. As required, the EPMO will engage the Enterprise Change Management team and the Director, Enterprise Planning, Risk and Performance to review the charter and ensure sufficient capital funds are available. The review may cause the process to loop back to the previous task for more clarity, information or refinement. Once the review is complete the EPMO will recommend that the Project Charter be submitted to the sponsor and PSC for approval.
Approve project to proceed	Sponsor	The sponsor will approve the project to proceed to the execution phase. The sponsor will approve the Integrated Project Plan and a revised Project Charter, if required for funding and schedule approval and notify the project manager and EPMO. If the sponsor does not have the appropriate authority to approve the project's budget, an additional approval authority would be required. It is the responsibility of the sponsor to seek this additional approval. Note: The approval will be formally documented in Citadel.
Document lessons learned	Project Manager	The project manager works with the project team to identify and document relevant lessons learned in the Planning Phase, and file them in the records management system.

Task	Responsible Role	Description
Execute Project		
Manage integrated project plan	Project Manager	The project manager will manage and direct the project as per the Integrated Project Plan which includes the project schedule. Note: Tasks should, at a minimum, include; the task description, resources required, the dependencies, effort and the estimated start and end date.
Activity "Build solution"	Project Team	Build and test solution. This includes building the business layers of the solution (e.g. business procedures, manuals, guides, and any End User Computing Tools). Note: SDLC and Partner processes will need to be engaged to build and test stages for the solution.
Develop go/no go recommendation	Project Manager	With input from the project team the project manager will develop a Go/No Go recommendation to deploy the solution. The Go/No Go recommendation should be based on end user readiness, signoff of the test plan acceptance, training completed, and end user material and documentation completeness
Ratify go/no go recommendation	Project Steering Committee	The project steering committee will ratify the Go/No Go recommendation to deploy the solution. Note: for projects that have employed the SDLC, the project steering committee will assess the outputs of the "Integration" and "Verification" SDLC processes and determine if the solution is ready to be migrated into production or if outstanding items must be addressed prior to executing the "Transition" SDLC process.
Approve go/no go recommendation	Project Sponsor	At the recommendation of the PSC the sponsor will review the Go/No Go recommendation and approve or reject the recommended move to production.
Activity "Deploy solution"	Project Team	Deploy solution. This includes deploying the business layers of the solution (e.g. business procedures, manuals, guides, and any End User Computing Tools). Note: SDLC and Partner processes will need to be engaged to for the deploy stages for the solution.

Task	Responsible Role	Description
Document lessons learned	Project Manager	The project manager works with the project team to identify and document relevant lessons learned in the Execution Phase, and file them in the records management system.
Close Project		
Evaluate project performance	Project Team	The project manager will facilitate the evaluation of the project's performance with the project team, key stakeholders and PSC. The project will be evaluated for performance against the deliverables and acceptance criteria outlined in the Integrated Project Plan and, performance against the baseline budget, schedule and achievement of business objectives (where ready to be measured) which will be documented in the Project Closure Report.
Document all lessons learned	Project Manager	The project manager works with the project team to identify and document relevant lessons learned in the Closure Phase, file them in the records management system, and consolidate all lessons learned during the project's lifecycle for PSC review.
Review lessons learned	Project Steering Committee	The project steering committee reviews consolidated lessons learned to ensure they are clear, relevant, and actionable, including identification of root causes and potential recommendations that support future projects and continuous improvement, and provides feedback to support finalization.
Perform completeness review of lessons learned	Enterprise Project Management Office (EPMO)	A member of the EPMO will review the lessons learned for clarity and completeness.
Finalize lessons learned	Project Manager	The project manager will update the lessons learned based on EPMO feedback and confirm with the sponsor that the lessons learned for the project have been finalized in the lessons learned repository.
Draft closure report	Project Manager	Upon completion of all the project deliverables including approved exceptions or cancellation of the project, the project manager will draft the project closure report for review and approval. The Project Closure Report will document the performance of the project, achievement of business objectives, deviations from the approved Integrated Project Plan and or Project Charter, and formally request completion of the project.

Task	Responsible Role	Description
Review closure report	Project Team	The project team will review the content of the Project Closure Report for completeness and accuracy. The review process is iterative and may loop back to the project manager or others for more information or clarity.
Perform completeness review of closure report	EPMO	The EPMO will review the Project Closure Report for quality, completeness and alignment to EPMO processes.
Complete closure report	Project Manager	Based on the review comments and feedback provided by the project team and/or the EPMO, the project manager will update and complete the Project Closure Report before submission to the steering committee for their review.
Ratify closure report	Project Steering Committee	The project steering committee will review the Project Closure Report. The review process is iterative and may loop back to the project manager for more information, clarity and/or suggested changes.
Approve closure report	Project Sponsor	The sponsor will review the Project Closure Report. The review process is iterative and may loop back to the project manager for more information, clarity and/or suggested changes. Note: approval of the Project Closure Report signifies the acceptance of all deliverables and business objectives of the project.
Notify approving authority of project closure	Project Sponsor	The project sponsor acts as the information conduit between the project team and IESO management. After approving the document, if the project sponsor is not the approval authority, they will notify the approving authority the project has been completed and provide a copy of the completed Project Closure Report for approval. Note: For projects approved by IESO's Board of Directors, the sponsor will prepare an overview presentation for the Board which will be included as a Consent Item on the appropriate Board Meeting agenda. The CEO will formally approve the Project Closure Report on behalf of the Board in Citadel.

Task	Responsible Role	Description
Confirm project artifacts stored in Aspen	Project Manager	Upon approval of the Project Closure Report the project manager will ensure that all relevant project artifacts are uploaded to the project's electronic folder. Project artifacts include, but are not limited to, PSC progress reports and meeting minutes, RAID log, business requirements, solution design documents, project schedule, and project budget. The project manager will notify the EPMO that the project has been completed and report the project as closed. Note: Citadel is the IESO's approved records management system and all project records must be stored in Citadel. Project records include but are not limited to: Project Charters, Project Exception Reports, Integrated Project Plans and, Project Closure Reports.
Release project resources	Project Manager	Upon approval of the Project Closure Report the project manager will formally notify the project team and resource managers that the project has been accepted by the sponsor and officially completed. Resources will either be assigned by their resource manager to another project or back to operational work.
Request activity code closure	Project Manager	Upon approval of the Project Closure Report the project manager will notify the EPMO that the project activity codes can be closed.
Administer project closure	Enterprise Project Management Office (EPMO)	A member of the EPMO will administer the project closure as per the Administer Project procedure IESO_PRO_0665.

Task	Responsible Role	Description
Administer Project Exception		
Communicate need for an exception report	Project Manager	The project manager will inform the project team and the EPMO of the intent to develop a Project Exception Report to address the deviation
Identify options to address the deviation.	Project Team	The project team will identify potential solutions to address the change or deviation. The solutions will be assessed for schedule, cost, scope, or quality impact to the project. The project manager and/or team members secure appropriate "in-principle" approvals from the PSC for the recommended solution. Note: if sufficient funds are not available to support the recommended option, the project team may need to further identify and recommend alternative approaches or propose that the project be cancelled/deferred if no viable solutions are identified.
Prepare exception report	Project Manager	The project manager, with input from the project team, will prepare the Project Exception Report. The project manager will clearly highlight the recommended solution to address the deviation or change as well as any cost, schedule, scope or quality impacts.
Update integrated project plan	Project Manager	The project manager will update the Integrated Project Plan to reflect the recommend solution documented in the Project Exception Report
Review project revision	Project Team	The project team will review the Project Exception Report content and the revised Integrated Project Plan for completeness and accuracy. The review process is iterative and may loop back to the project manager or others for more information or clarity.
Perform completeness review of project revision	Enterprise Project Management Office (EPMO)	A member of the EPMO team will review the Project Exception Report and revised Integrated Project Plan for quality, completeness and alignment to EPMO processes
Perform portfolio impact assessment	Enterprise Project Management Office (EPMO)	A member of the EPMO team will engage the "Monitor Project Portfolio" process to confirm with the Project Portfolio Management Team if sufficient resources and funds are available to support the recommended option in the Project Exception Report.

Task	Responsible Role	Description
Review portfolio impact assessment	Enterprise Change Control Board (ECCB)	The ECCB will review the portfolio impact assessment and may approve or reject changes that fall within defined financial, schedule, and risk thresholds, including trade-offs that do not impact portfolio priorities or strategic outcomes. Where escalation is required, the ECCB will present the proposed changes to the EPPC, which holds accountability for portfolio outcomes.
Approve portfolio changes and trade-offs	Enterprise Portfolio & Planning Committee (EPPC)	The EPPC will approve or reject proposed portfolio changes and trade-offs. Approval does not guarantee entitlement, as portfolio positioning remains subject to enterprise constraints.
Revise project revision	Project Manager	Based on the feedback provided by the project team and/or the EPMO, the project manager will update and complete the Project Exception Report before submitting to the PSC for their review.
Ratify project revision	Project Steering Committee	The PSC will review the Project Exception Report and the recommended solution/approach. The PSC will also review the revised Integrated Project Plan. The PSC will recommend the Project Exception Report and revised Integrated Project Plan for sponsor approval. The review may cause the process to loop back to the previous task for more clarity, information or refinement.
Approve project revision	Sponsor	The sponsor will approve the project revision via the Exception Report and Integrated Project Plan. The project manager and EPMO will be notified of the approval. Where they have sufficient authority as per the Finance Policy, the sponsor will approve the revised overall project budget and schedule. If the sponsor does not have the appropriate authority to release the project's revised budget, an additional approval authority would be required. It is the responsibility of the sponsor to seek this additional approval. The approval will be formally documented in Citadel. The project manager will return to the 'Manage project schedule' or 'Manage integrated project plan' task depending on the active phase of the PPMLC.

Task	Responsible Role	Description
Update project baseline	Project Sponsor	A member of the EPMO team will update the project's revised schedule and/or budget in the EPMO reporting repository.
Cancel/Defer Project		
Request cancelation impact assessment	Sponsor	At the recommendation of the EPPC or PSC, the sponsor will ask the project manager to have the project team perform an assessment of the impact of canceling or deferring the project. The project team may be required to put in-flight work on hold while the assessment is completed.
Project cancelation impact assessment	Project Team	The project manager will facilitate the project team's impact assessment of canceling or deferring the project. As part of the assessment the project team should determine the impact to each stakeholder group, consider any open contractual agreements, and determine if the project is able to deliver an asset within the recommended timeline to close the project. The project team will provide a recommendation of which deliverables should be completed prior to closing the project in order for the organization to realize the benefit of some of the work already completed and or to put the project in a good position if it is being deferred to another fiscal year.
Review impact assessment	EPMO	The project manager will meet with the EPMO to clarify the impact assessment of canceling or deferring the project, and assess any alternative deliverables or activities to close the project based on the nature of the project or circumstance around canceling or deferring the work.
Recommend final deliverables	Project Manager	The project manager will summarize and present the impacts of canceling or deferring the project to the PSC and provide the recommended deliverables to be completed prior to project closure. These may include, but are not limited to, completing draft versions of outstanding artifacts, deliverables, lessons learned, and closure report.
Ratify final deliverables	Project Steering Committee	The PSC will ratify the recommended list of deliverables to be completed prior to closing the project. The list of deliverables may be modified depending on the priorities of the business and timeline constraints to stop the project. The final list of project deliverables will be sent to the project sponsor for approval.

Task	Responsible Role	Description
Inform EPPC of decision not to cancel	Sponsor	If after reviewing the impact assessment the sponsor does not believe that canceling or deferring the project would be in the best interest of the organization, they will inform the chair of the EPPC of the decision and request that an alternative assessment of the portfolio be performed to identify if any other alternative options are available. A new instance of the 'Cancel project' activity may start if the EPPC chair informs the sponsor of a revised EPPC decision.
Approve project cancelation	Project Sponsor	At the recommendation of the PSC, the sponsor will review the recommended list of deliverables to be completed prior to closing the project. The list of deliverables may be modified depending on the priorities of the business and timelines constraints to stop the project. The final list of project deliverables will be approved and communicated to the project manager. The project sponsor will notify the appropriate OAR approving authority of the intent to cancel the project and authorize the project manager to begin closing the project.
Notify key stakeholders of impacts	Project Sponsor	The sponsor will communicate the project cancelation decision to key impacted stakeholder groups and inform them of any impacts to their respective areas.
Communicate cancellation decision	Project Manager	The project manager will communicate the decision to cancel the project to the project team and other impacted stakeholders as appropriate.
Manage final deliverables	Project Manager	The project manager will communicate the approved final list of deliverables to the project team, update the project schedule as required, and direct the completion of the deliverables.
Complete final deliverables	Project Team	The project team will complete all approved remaining deliverables required to close the project. Once completed, the project will advance to the 'Closure Phase' and begin completing the closure activities approved by the project sponsor. Note: the closure report will be used to close projects that have been completed and those that have been cancelled.

3.3 Tasks and Controls

21. Each control specified in the process requirements is implemented in one or more tasks.

Table 3-3: Task and Control Cross Reference

Task	Controls
Confirm project outline	5
Manage communication	8, 9, 15, 16
Conduct PSC meeting	11, 12
Perform completeness review of project charter	13
Perform completeness review of project revision	14

3.4 Accountability and Responsibility

22. Each task in the process will be placed in the ARCI matrix. The ARCI matrix defines the four possible relationships between roles and tasks – who is **A**ccountable, who is **R**esponsible, who must be **C**onsulted, and who must be **I**nformed.

23. **A**ccountable: The role accountable for a task is held accountable to ensure that all tasks achieve their prescribed outcomes within mandatory service levels. The person accountable must ensure that procedures, mandatory steps to perform a task, are followed. The process steward is usually held accountable for all tasks in a process, not the supervisor of the person filling the role.

24. **R**esponsible: The roles that perform the task are responsible for the task. At least one role must be assigned primary responsibility for achieving the task outcome, indicated with an upper case 'R'. Additional roles who assist or participate in the task may be assigned secondary responsibility for achieving the task outcome, indicated with an lower case 'r'

25. **C**onsulted: These roles must be consulted in order to provide an input to the task. The input may be information or advice. Optional consultation may be noted in the task description, but does not appear as a 'C' on the ARCI matrix.

26. **I**nformed: These roles must be informed about the outcome of the task. Do not include roles that have primary responsibility for tasks immediately downstream of this task, as informing them is implied on the process model. There may be other roles who are optionally informed, but this does not appear as an 'I' on the ARCI matrix.

27. The chart is setup with the roles across the horizontal axis and the process tasks on the vertical axis.

28. The Process Steward is accountable for all tasks.

29. Each project will create a RACI highlighting project specific roles, deliverables and sponsor accountabilities.

Table 3-4: ARCI Matrix

							Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Initiation Phase															
Assign initial team		C					I	I					I	R	
Request project setup							R						I		

						Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Setup project						I	I						R		
Outline project		C		C	C		R	r	C	C	C	C	C		
Confirm project outline		r, C		I	I		R	I	I	I	I	I	I		
Nominate project steering committee (PSC)		R		I	C		C	C							
Accept nominations		I	R				I								
Conduct PSC meeting		r, C	r, C				R	C	C	C	C	C	I		
Obtain project team		I	I	r, C			R	I	I	I	I	I			
Refine project	C	C	C	C	C		R	r	r	r	C	C			
Develop schedule		C	C	r, C			R	C	C	C	C	C			
Develop budget		C	C	C			R	C	C	C	C	C			
Draft project charter		C	C	C			R	r	C	C	C	C			
Completeness review of project charter							I						R	r	
Revise project charter							R	r	I	I	I	I			
Ratify project charter		I	R				I								
Obtain approval of project as per the OAR	r	R	I	I			I	I	I	I	I	I	I	I	
Planning Phase															
Manage project schedule							R	C	C	C	C	C			
Monitor project progress							R	C	C	C	C	C			
Manage project risks		I	I				R	r	r	r	r	r			
Manage Communication		I	I	I	I		R	C	C	C	C	C	I	I	
Refine business objectives		C	C		C		r	R	r	r	C	C			
Refine project deliverables		I	I	I	I		R	r	r	r	r	r			

							Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Develop integrated project plans		I	I	I	I		R	C	C	C	C	C	C		
Refine budget estimate							R	C	C	C	C	C	C		
Refine schedule estimate							R	C	C	C	C	C	C		
Review Integrated Project Plan		I			I		R	r	r	r	r	r			
Completeness review of integrated project plan							I						R	r	
Revise integrated project plan							R	I	I	I	I	I	I		
Ratify integrated project plan		I	R				I						I		
Update project charter							R	r	C	C	C	C			
Review updated project charter		I		I	I		R	r	r	r	r	r			
Completeness review of updated project charter							I						R	r	
Approve project to proceed	r	R	I	I	I		I	I	I	I	I	I	I	I	
Execution Phase															
Manage integrated project plan							R	I	I	I	I	I			
Develop go/no go recommendation							R	r	r	r	I	I			
Ratify go/no go recommendation		I	R				I	I	I	I	I	I			
Approve go/no go recommendation		R	I	I	I		I	I	I	I	I	I	I	I	
Closure Phase															

							Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Evaluate project performance		C	C	C	C		R	r	r	r	r	r	C		
Document all lessons learned		C	C	C	C		R	C	C	C	C	C			
Completeness review of lessons learned							I						R		
Finalize lessons learned		I	I	I	I		R	I	I	I	I	I	I		
Draft closure report		I	I				R	C	C	C	C	C	C		
Review closure report							R	r	r	r	r	r			
Completeness review of closure report							I						R	r	
Complete closure report							R	I	I	I	I	I	I		
Ratify closure report		I	R				I								
Approve closure report	I	R	I	I	I		I	I	I	I	I	I	I	I	
Notify approving authority of project closure	I	R					I						I		
Confirm project artifacts stored in Aspen							R	r	r	r	r	r			
Release project resources		I	I	I			R	I	I	I	I	I			
Request activity code closure						I	R						I		
Administer project closure						I	I						R		
Administer Project Exception															

							Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Communicate need for an exception report		I	I	I			R	I	I	I	I	I	I	I	
Identify options to address the deviation.				C	C		R	r	r	r	C	C			
Prepare exception report				C			R	C	C	C	C	C	C		
Update integrated project plan		I	I	C	C		R	C	C	C	C	C			
Review project revision							R	r	r	r	r	r			
Completeness review of project revision							I						R	r	
Confirm funds availability							I						R	r	
Revise project revision							R	I	I	I	I	I			
Ratify project revision		I	R					I							
Approve project revision	r	R	I	I	I		I	I	I	I	I	I	I	I	
Cancel/Defer Project															
Direct project to perform cancelation assessment		R	I	I			I	I	I	I	I	I	I	I	
Project cancelation impact assessment		C	C	C	C		R	r	r	r	C	C			
Review impact assessment							r						R	I	
Recommend final deliverables							R	I	I	I	I	I	I		
Ratify final deliverables		I	R				I								

						Project Team								
Task	**Approving Authority**	**Project Sponsor**	**Project Steering Committee**	**Resource Manager**	**Stakeholders**	**Advisor, Financial Planning & Analysis**	**Project Manager**	**Business Analyst**	**Subject Matter Expect**	**Solution Analyst**	**Procurement Specialist**	**Contract Manager**	**EPMO**	**Enterprise Change Management**	**EPPC Chair**
Inform EPPC of decision not to cancel		R	I	I	I		I	I	I	I	I	I	I		I
Approve project cancelation	I	R	I	I			I	I	I	I	I	I	I	I	I
Notify key stakeholders of impacts		R	r	I	I		r								
Communicate cancelation decision					I		R	I	I	I	I	I	I		
Manage final deliverables							R	R	r	r		r			
Complete final deliverables		I	I				R	r	r	r		r			

– End of Section –

Glossary

Business Process

A business process is a sequence of logically related tasks performed to achieve a defined business outcome. It is a structured, measured set of activities designed to produce a specific output for a particular customer or market.

Business Case

A document used to capture, review and evaluate potential projects to be considered in the project portfolio.

Formal Project

A project which impacts more than one business unit, requires over $200,000 in capital or operating dollars, has material project resource requirements, or deemed to be a formal project by the EPPC.

Informal Project

A project that requires less than $200,000 in capital or a larger capital purchase that require less than 40 hours of project labor to implement. Examples: minor enhancements, proof of concepts or hardware purchases.

Integrated Project Plan

The integrated project plan is a controlled document which outlines "how" the project will be executed. The integrated project plan contains all the management plans required by the project including but not limited to: quality assurance management, communications management, resource management, schedule, budget, risk, controls.

Organizational Authority Register (OAR)

A document that outlines the IESO's authority levels for approving expenditures.

RAID Log

A template used to document and manage Risks, Actions, Issues, Decisions and Change (RAID). A core component of the RAID Log is the risk register and risk matrix.

Scope

The work that needs to be accomplished to deliver a product, service, or result with the specified features and functions (PMI).

Solution Delivery Life Cycle (SDLC)

The solution delivery life cycle (SDLC) is a framework that defines the processes and tasks performed as part of solution delivery.

Project

A project is a temporary endeavor undertaken to create a unique (i.e. non-standard) product, service or result with a defined timeline, budget and resources.

Project Charter

The Project Charter is the document that formally authorizes the initiation of a project and gives the project manager authority to apply organizational resources to the project activities, and gains the commitment of resource managers and stakeholders.

Project Exception Report

A control document that is used to change the baseline budget, schedule or business objectives documented in the latest version of the approved project charter.

End of Document –