

Grid Mod Portfolio Close Out Plan

09.28.2022



Agenda

GRID Modernization 

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

Purpose



GRID Modernization

- Provide overview of GM Portfolio Close Out Plan
- Gain support from Executive Sponsors and project teams
- Prepare for transfer of ownership and closure of projects

Context

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

Considerations

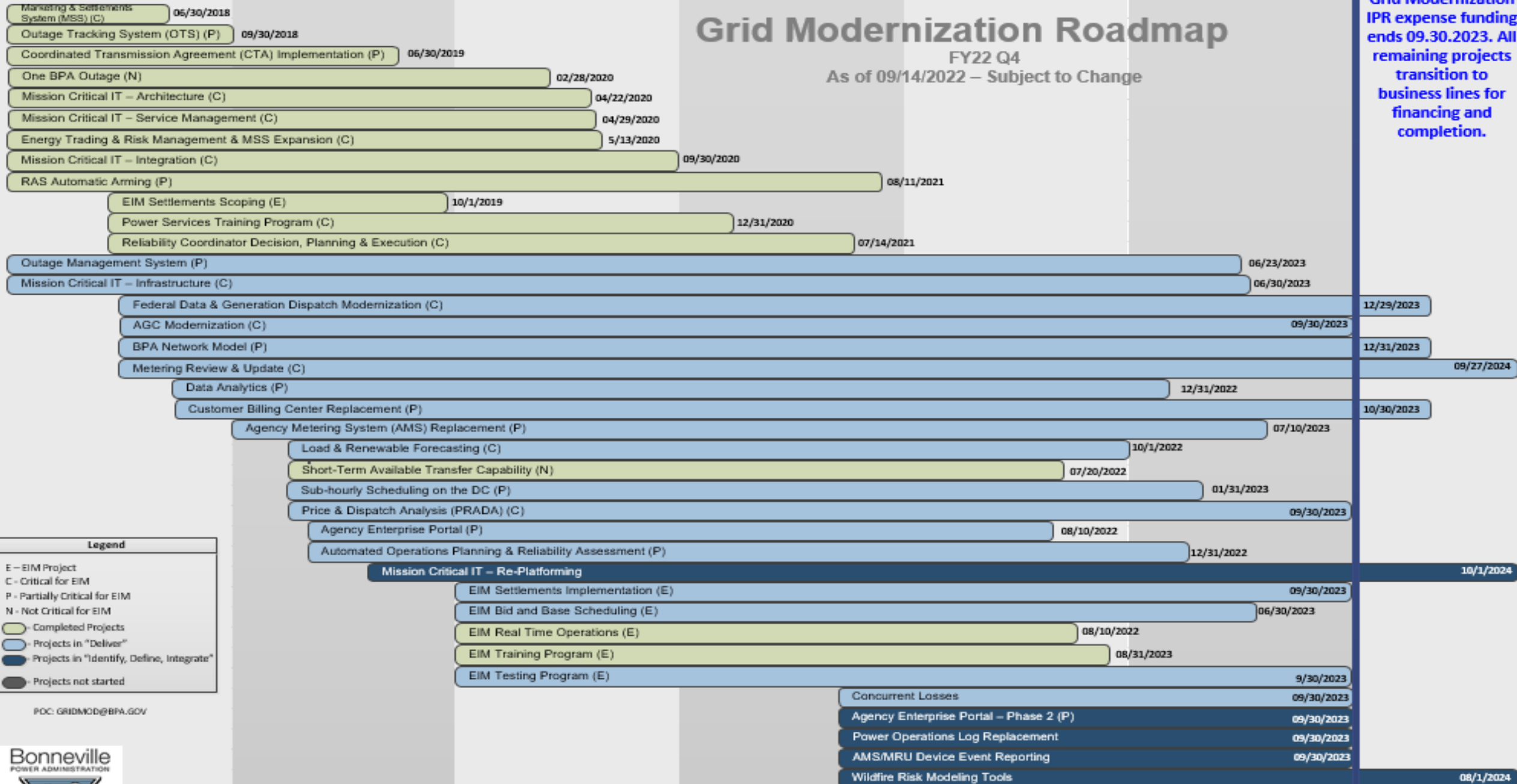
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- Timeline (1 year out):
 - Projects scheduled to close out under GEM Subcommittee oversight
 - Provide quarterly update to GEM
 - Additional BTO support (as available)
 - TT/J Prioritization
 - FY24+ projects move to business lines
 - Governance
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

Grid Modernization Roadmap

FY22 Q4
As of 09/14/2022 – Subject to Change

Grid Modernization IPR expense funding ends 09.30.2023. All remaining projects transition to business lines for financing and completion.



Legend

- E – EIM Project
- C – Critical for EIM
- P – Partially Critical for EIM
- N – Not Critical for EIM
- Green bar – Completed Projects
- Light Blue bar – Projects in "Deliver"
- Dark Blue bar – Projects in "Identify, Define, Integrate"
- Grey bar – Projects not started

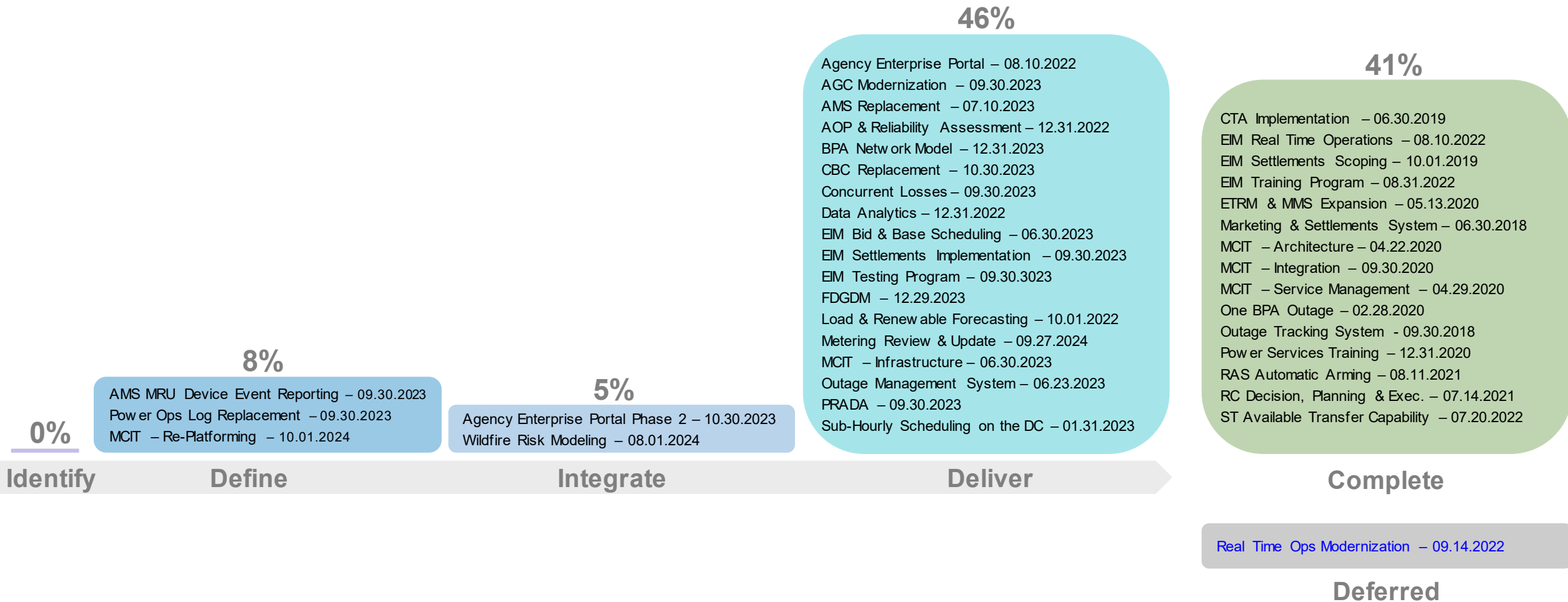
POC: GRIDMOD@BPA.GOV



Grid Modernization Mobilization

GRID Modernization

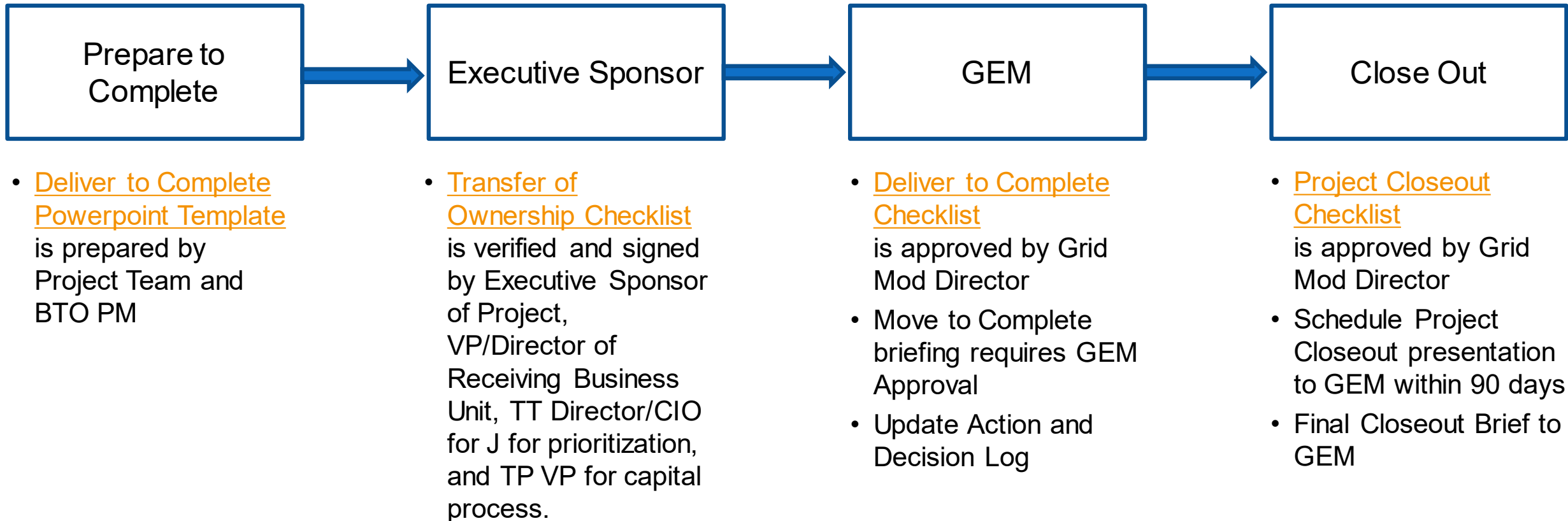
Updated: 09.20.2022
Date = Completion Date



Close Out Steps per IDID process

GRID Modernization

Sharing for awareness – this process is standardized



Steps to Closing Grid Mod Portfolio



GRID Modernization

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

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

Key Takeaways

GRID Modernization 

By end of FY23,

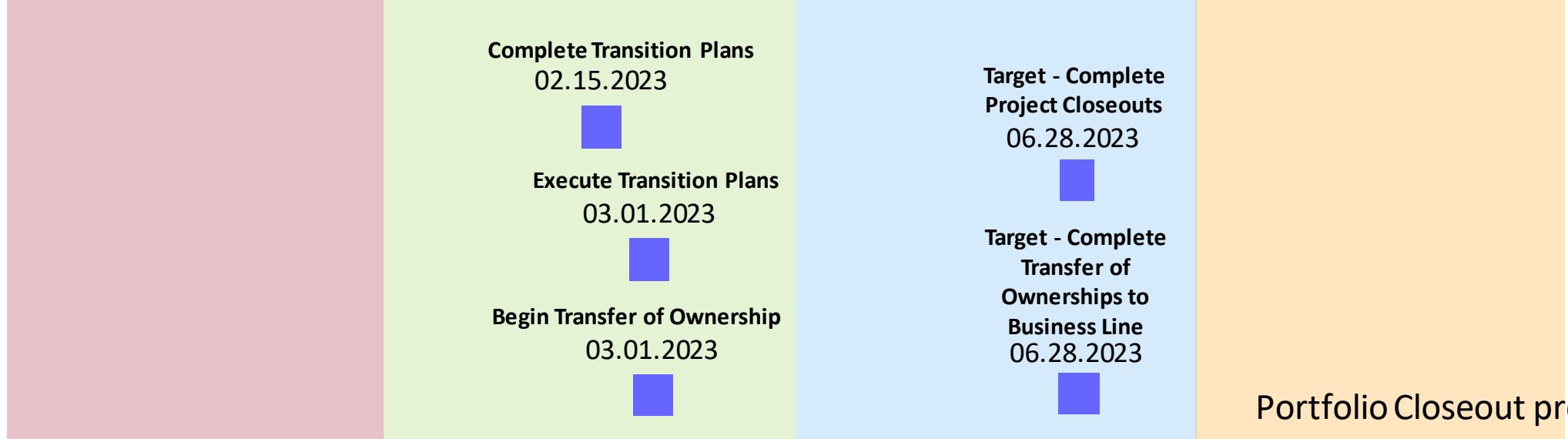
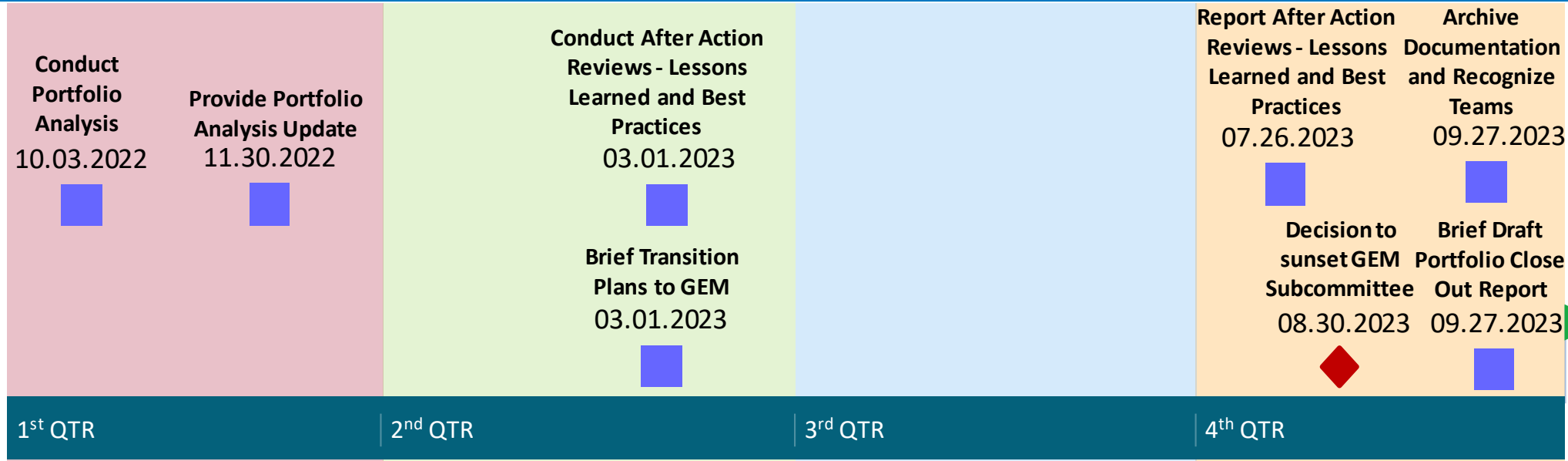
1. Projects will complete or transfer to a business line, per individual project plans
2. Those projects requiring resources in FY24 and beyond will shift to business line *prioritization* for resources (staffing, funding, oversight)
3. Decision made on GEM Subcommittee (sunset when appropriate – once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

GM Portfolio Close Out Timeline



2023

2024



Knowledge Transfer



GRID Modernization

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

Questions?