

Actions to address Work Planning and Scheduling System lessons learned

Action	Executive owner	Staff assigned	Due date
Understand the business environment of vendor references.	Furrer	Furrer	Now
Partner with Transmission colleagues and better understand the transformation required for EPIP/IPPI, and create a crisp roadmap.	Furrer	Kammy Rogers-Holliday	12/1/12
Observe and question projects from a broader perspective.	Furrer	Furrer	Now
<p>Modify the Systems Life Cycle methodology to require a project, if ‘red’ for two or three months in a row, to be put on a “health watch” that triggers reassessment of the business case, a revised cost/benefit calculation, and a presentation to the APSC.</p> <p>All projects on health watch will be made visible and broadly communicated to other relevant governing bodies (ACPRT and CAB) where appropriate.</p>	Buttress	Lulu Zhang	11/1/12
<p>Empower the APSC to critically evaluate projects on health watch, and to provide candid recommendations to the CIO and the project sponsors.</p> <ul style="list-style-type: none"> • Should the project sponsors overrule an APSC recommendation to stop a project, that decision to proceed will be widely published to senior executives and to the front office. • Should the APSC recommendation be to proceed with the project, the project sponsors will be required to fully describe the mitigating actions that will be taken to get the project back on track. 	Buttress	Jeff DiGenova	11/30/12



Action	Executive owner	Staff assigned	Due date
Strengthen the role of the PMO portfolio manager to be more aware of troubled projects, and require them to challenge the monthly red/yellow/green scoring.	Buttress	Lulu Zhang	11/1/12
The portfolio manager will meet quarterly with business line sponsors to review the overall portfolio status. Health watch projects will be spotlighted in these reviews.	Buttress	Lulu Zhang	12/30/12
Modify the SLC to ensure business cases are revised/reassessed at each SLC milestone.	Buttress	Lulu Zhang	9/30/12
<p>Ensure that business processes are created and agreed upon before contemplating an automated solution (don't build your processes and requirements to fit a software system.)</p> <ul style="list-style-type: none"> • Complete – creating and modifying the SLC, increasing PMO and APSC awareness and focus. • Complete – setting aside additional budget dollars to work with business on the front end of projects. • Action item – require business case documentation for all proposed IT projects as part of the FY14 project prioritization and selection process. 	Juj	Jeff DiGenova	February 2013

Action	Executive owner	Staff assigned	Due date
<p>Improve contract controls:</p> <ul style="list-style-type: none"> • New COTR training, statement of work classes • Contract language for what is delivered and when • Potential penalties for non-delivery • Requirements for maintenance agreements if system is not accepted or used by the business, non anticipated, and options for extended warranties • Signatures from executive sponsors before payments are made to vendors (PMs should not be authorized to approve payments). Assurance for what is deliverable and payments are in alignment. Exceptions are risk based. 	Juj	Tom Oleson	October 2012
<p>Avoid turnover:</p> <ul style="list-style-type: none"> • Create and maintain a formal project staffing plan and alternatives analysis for each project. • Establish a managed staffing and services contract within the PMO to increase resource stability and decrease reliance on supplement/staff augmentation resources. • Expand the use of retention bonuses for critical CFTE roles based on established set of criteria as appropriate. 	Juj	Jeff DiGenova	<p>October 2012</p> <p>November 2012</p> <p>January 2013</p>
<p>Ensure executive sponsors and I complete a detailed review of all new Transmission IT business cases.</p>	Bekkedahl	Bekkedahl	Now
<p>Ensure the APSC and IPPI members review the WPSS RCA; remind them of their responsibility to complete periodic business case assumption reviews and health watch alerts.</p>	Bekkedahl	Bekkedahl	10/31/12

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Review ongoing transmission projects - the original business cases, project manager experience, and potential risks.	Bekkedahl	Bekkedahl/ Kim Webber PMO	11/30/12
With the PMO, complete exit interviews when a PM leaves a project.	Bekkedahl	Bekkedahl/ Kim Webber PMO	11/30/12
Ensure learning is shared across executive team.	Decker	Decker	Complete
Ensure defined protocol for revisiting business case analysis is adopted.	Decker	Buttress	9/30/12
Establish standard protocol (check list) for executive sponsors.	Wright/Decker	Buttress/ DiGenova	NLT Jan. 1, 2013
Enforce that the business and IT PMO provide a business process and business requirements readiness before any project is initiated. Annual assessment during IT Capital Budget Approval Process at the Business Operations Board in August.	Decker	Buttress/ DiGenova	First confirmation by Nov. 1, 2012, then annual assessment at BOB
Ensure that RCA learnings are shared across executive team using a standard process for criteria-defined events/incidents as part of BPA's new corrective action program.	Leathley	Mainzer/ Watson (RCA Team)	NLT April 1, 2013
Share learnings from this RCA across the executive team.	Wright	Wright	Complete
Monitor commitments of executives	Wright	Furrer	Monthly status report Oct. 1, 2012, through Sept. 30, 2013
Consider establishing a protocol for sponsors to understand the underlying business case and resource adequacy before a project starts.	Wright	Buttress/ DiGenova	NLT Jan. 1, 2013
Review learnings and follow up actions in performance appraisal process.	Wright	Wright	10/31/12