Asset Management Lifecycle Governance Team
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Institute of Asset Management Framework

Purpose of Asset Management

Value
- Use assets to deliver value and achieve business objectives
- Align assets to the customer value proposition
- Operate safely
- Meet regulatory and statutory regulations

Alignment
- Asset management decisions are informed by asset capabilities, performance, opportunities, and constraints
- Asset management activities are aligned throughout the organization and are considered from a system-wide perspective

Leadership
- Set clear direction and priorities for asset management
- Organization structure and culture are conducive to asset management objectives

Assurance
- Assets will fulfill their required purpose
- Asset management objectives are achieved consistently and sustainably over time

Guiding Principles

Value
- Keep a BPA and Transmission perspective
- Strive for Lean
- Focus on process
- Adopt industry standards

Alignment
- Integrate disparate processes and organizations
- Align technology solutions with business
- Coordinate IT implementations

Leadership
- Success is based on leadership and ownership
- Drive decisions to the right level of management
- Integrate change management

Assurance
- Gain measurable and recognizable commitments
- Promote continuous improvement as a core competency
- Provide easily accessible quality data
Capital Investment Acquisition Process

Asset Planning Phase
- Draft
- Project Initiation
- Visibility & Feasibility
- Concept Design
- Project Execution Planning
- Design
- Construction
- Energization and Close Out

Project Scoping Phase
- SG #0
- SG #1
- SG #2
- SG #3
- SG #4

Design Phase
- Detailed Design
- Final Design
- Pre-construction
- Construction
- Post-construction
- Project Closeout

Construction Phase
- Construction
- Post-construction
- Project Closeout

Energization & Close Out Phase

Customer-Driven Projects

Customer Meetings, Agreements & Studies
- Customer Meetings
- Agreements
- Studies
- Project Engineer Consulting Support

Design Activities
- Resource execution decision
- Final review of scope, cost, and schedule
- Funding approval
- Contracting process initiated

Construction Activities
- Construction or LGI or SGI Agreement Offered
- NEPA decision by end of Design

Key Deliverables
- Customer Meeting #1
- Feasibility Study Letter/Agreement
- Feasibility Study
- Customer Meeting #2
- System Impact Study Letter/Agreement
- System Impact Study
- Typical Estimate(s)
- Plan of Service Offered

Key Deliverables
- Customer Meeting #2
- Facilities Study Letter/Agreement Offered
- Preliminary Engineering Agreement Offered
- Environmental Letter/Agreement
- Scoping/Preliminary Engineering Initiated
- Facilities Study Initiated
- Site Visit

Key Deliverables
- Facilities study completed
- Project Schedule Commitment
- Finalized project cost estimate(s)
- Engineering & Procurement or Construction or LGI or SGI Agreement Offered
- Contract Bid Process Initiated

Key Deliverables
- Construction or LGI or SGI Agreement Offered
- NEPA decision by end of Design

Key Terms
- SG: Stage Gate
- LGI: Large Generation Interconnection
- NEPA: National Environmental Policy Act
- SGI: Small Generation Interconnection

* = Calendar Days