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April 23, 2025

Rod Toula
Interprovincial Lottery Corporation
40 Holly Street – 6th Floor
Toronto, ON M4S 3C3

Dear Mr. Toula:

Re: BCLC's Report on Compliance with ILC Control Standards

We have completed the audit of BCLC's compliance with the Interprovincial Lottery Corporation's
("ILC") Control Standards as required in the Regional Responsibilities (Section 1.2) of the ILC
Policies and Procedures Manual. Please find attached the completed Annual ILC Control
Standards Audit Report (referred to as Appendix 12 B).

The enclosed Appendix 12 B is intended for the exclusive use of BCLC and ILC in assessing BCLC's
compliance with the Control Standards as of March 31, 2025, and is not to be relied upon for any
other purpose.

Yours truly,

s. 22

Rao Wandawasi
Director, Audit Services

AUDIT REPORT

Project Management Office

Audit Services

FY2025

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Table of Contents

Date: June 27, 2025

From: Rao Wandawasi, Director, Audit Services

To   Mark Goldberg, Chief Information Officer and VP, Business Technology

Re: **Project Management Office**

I.   Introduction

In accordance with the Audit Plan presented to the Audit Committee, Audit Services conducted an audit of BCLC's Project Management Office (PMO). Pertinent BCLC Management and Audit Services determined the scope of this engagement jointly in a collaborative manner.

The audit report is presented for information and discussion. For the issues identified in the report, an "agreed upon action plan" has been developed in collaboration with management. These action plans are tracked by the Audit Services team for timely implementation. Any delays or non-execution of the action plan is compiled and presented to the Audit Committee periodically.

II.   Objective and Scope

The scope of this audit included a review of completed and ongoing projects managed by BCLC's PMO and divisionally led project leads. The objective of this audit was to evaluate BCLC's project management policies and processes based on best practices for successful project implementation. Audit Services' review included, but was not limited to, the following:

1. Understand BCLC's definition of a Project – the standards and criteria required to be met for a project management consideration.

2. Understand and assess BCLC's project management processes and benchmark with project management best practices:

    a.   Defined project boundaries, goals and objectives.

    b.   Tracking and variance analysis.

    c.   Work authorization and change controls.

    d.   Project risk identification and management.

    e.   Quality assurance and controls testing prior to go live.

    f.   Reporting protocols for progress, issue escalation and resolution.

3. Application/implementation of past projects' learnings and improvements to assess BCLC's ability to successfully manage future projects.

4. Review the policy and processes on internal projects not led by PMO (divisionally led projects).

III. Executive Summary

BCLC's roadmap for the next five years includes numerous projects totaling over $500 million that will aid in achieving an aggressive and proactive strategic plan. In this backdrop, it is essential that the PMO is operating effectively, is well recognized within the organization and is assisting stakeholders with Project Management (PM) services for successful and well managed projects that aid in the organization's growth/maturity.

Reviewing the PM process, opportunities for further improvement were noted. Key points are listed below:
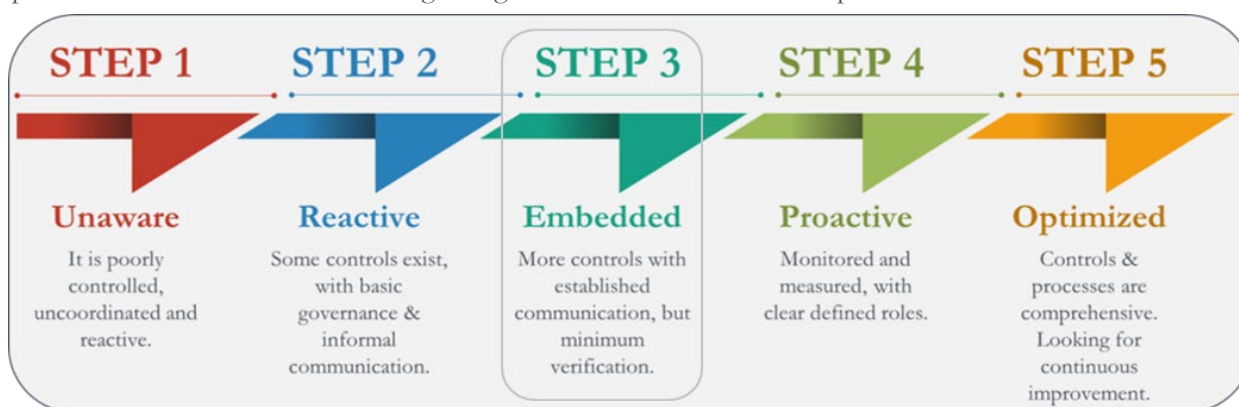
1. <u>Governance</u>: While the PMO has effectively supported evolving project requirements and managed diverse project demands, it operates without a formal mandate and charter. Further, PMO has limited visibility into Divisionally Led Projects resulting in inconsistent adherence to BCLC frameworks specific to project management. The PMO faces workforce planning risks due to high contractor reliance, limited FTEs, and upcoming retirements, impacting continuity and long-term stability.

2. <u>Project Prioritization</u>: Lack of an enterprise project prioritization framework results in Delivery Teams having their own task priorities different from PM resulting in resource conflicts. Additionally, divisional and operational tasks often take priority, creating a gap between immediate demands and the long-term strategic focus required for successful project execution.

3. <u>Major Programs (projects)</u>: At times, there is delay in PMO involvement with major programs. Substantial ownership and leadership of PM is with the pertinent SLT member spearheading the initiative. Key points to consider are:
   a. Set issue resolution expectation upfront with vendor.
   b. Plan for setback and course correction.
   c. Challenge function within governance committee.
   d. Educate pertinent SLT on PM specifics.

4. <u>Collaboration:</u> Successful projects stem from strong collboration between Project Managers, Project Teams, Delivery Teams and Support Teams. PMO to be involved during the SOW and planning phase. For change management, within PMO and division-led projects there is opportunity for consistency with the application of the Change Management Capability.

5. <u>Resource Utilization</u>: Transition planning both during on-boarding and off-boarding for projects requires strengthening to address unique needs of different departments. The Master Project List exists, but interdependencies specific to resources needs to be captured, highlighted and tracked. Further training is required specific to project risk management, and appropriate use of required internal delivery and procurement processes.

> **Improvement Opportunities Recognized by Other Crown Corporations**
>
> ➤ Ensuring a consistent governance model with aligned stakeholder understanding.
> ➤ Ongoing value engineering to stay on track with budget, scope, and schedule.
> ➤ Categorizing projects by scale and complexity.
> ➤ Creating after-action reports to document lessons learned and apply them to future projects.
> ➤ Balancing documentation without overburdening small projects with excessive tasks.
> ➤ Maintaining decision logs to prevent disputes and ensure decision clarity.
> ➤ Conducting audits at project start and end to assess governance.

6. <u>Performance Management</u>: Outdated business cases require the PMO to repeatedly update business cases, Key Performance Indicators (KPIs), and at times project budgets to reflect current realities. Further, reference to recent budget versions offers insight into short-term budget trends. However, to optimize budget management, it is essential to maintain a consistent reference to the original budget baseline for accurate analysis and decision-making.

7. <u>Benefits Realization & KPIs</u>: With KPIs, often the tracking is towards project completion or reaching go-live stage, with less emphasis on creating a comprehensive KPI measurement framework that extends beyond the initial implementation. Similarly, with benefits realization, projects often finish before the benefits are seen, which makes measuring success harder. Also, Decision Support team, business units, and PMO rarely request post-project assessments.

BCLC's PMO maturity was evaluated through comprehensive benchmarking against industry best practices (see Appendix II) and interviews with other BC Crown Corporations. The assessment examined key dimensions including governance structures, resource management, performance measurement, and change management integration. Leading organizations demonstrate mature PMOs with formalized mandates, integrated change management function, robust benefits realization tracking, and comprehensive performance frameworks – achieving ratings of four and above in a five-point scale.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Unaware	**Reactive**	**Embedded**	**Proactive**	**Optimized**
It is poorly controlled, uncoordinated and reactive.	Some controls exist, with basic governance & informal communication.	More controls with established communication, but minimum verification.	Monitored and measured, with clear defined roles.	Controls & processes are comprehensive. Looking for continuous improvement.

The current maturity level of **3/5 – Embedded Level,** indicates that BCLC's PMO has established consistent project management practices but requires development in certain areas. While fundamental processes exist, the lack of standardization, formal governance structures, and comprehensive performance measurement frameworks highlights room for improvement. BCLC demonstrates awareness of project management best practices but faces barriers in consistent execution and strategic alignment. To progress toward higher maturity levels, BCLC should address the identified gaps in this report.

Conclusion:

The PMO has effectively supported BCLC's evolving project requirements, but certain improvements within the PMO and supporting delivery capabilities are needed to further enhance its strategic value. Key recommendations include establishing a formal PMO mandate, implementing comprehensive performance measurement frameworks, strengthening resource management practices, and improving change management integration. These enhancements will position the PMO and BCLC's delivery frameworks to better support BCLC's strategic objectives while maintaining the flexibility needed in today's dynamic business environment.

IV. Details of Key Issues

1. OPERATING MODEL AND STRATEGIC ALIGNMENT FOR PROJECT EXCELLENCE

Project governance defines and clearly articulates structured roles, responsibilities, and accountabilities within the project, and facilitates decision making. For project managers this is important, when there is a deviation in scope, budget, time, resources, quality, or when a risk presents itself. The governance framework clarifies who is impacted by these issues and how to address them.

OBSERVATION:

A. Formalized Operating Model

a. <u>No Formal Mandate and Charter</u> – While the PMO has effectively supported evolving project requirements and managed diverse project demands, it operates without a formal mandate and charter. This results in the following challenges:

> The PMO charter define its purpose, vision, authority, and strategic alignment with the organization's broader goals

  i. Decision Making Authority - The Agile delivery model, which emphasize decentralized decision-making and team autonomy, can conflict with PMO's role in standardizing processes.

  ii. Awareness - Lack of formal recognition makes it challenging for the PMO to effectively communicate its value and authority to stakeholders.

  iii. Adaption - Inconsistent adherence to best practices across teams makes it difficult for the PMO to implement them regularly. For example, new templates introduced by PMO are at times overlooked or not consistently utilized by stakeholders.

b. <u>Methodology to Determine PMO Involvement</u> - The PMO is primarily focused on ensuring the efficient delivery of projects and the achievement of immediate objectives. While this focus supports the successful completion of individual projects, the application of project frameworks across different initiatives remains inconsistent, resulting in variations in oversight and a lack of standardization.

Currently, several frameworks are in place to guide PMO-led and Divisionally-led projects to confirm quality and alignment with organizational goals, including:

  i. Project Delivery Model (i.e: Agile)
  ii. PMO Delivery Process
  iii. Divsionally Led Project Management Framework

> Enhanced monitoring and consistent application of BCLC frameworks can drive greater alignment, accountability, and project success.

However, there is limited visibility into the consistent adherence to these frameworks, which may result in gaps in oversight and misaligment. Strengthening the enforcement and monitoring of practices can improve alignment, accountability, and project quality, ensuring that projects meet both immediate goals and broader strategic objectives.

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c. <u>PMO's Reporting Structure</u> – PMO's reporting structure is rightly aligned and positioned within Business Technology (BT). There may be a perception that PMO primarily supports BT initiatives, leading to indifference in recognition and support from other business units. This could undermine PMO's ability to function as a central governance body for project management practice across BCLC.

Additionally, to create synergy and ensure alignment with the Enterprise Portfolio, the PMO should actively integrate standardized tools, methods, and delivery standards with the broader strategic objectives of the enterprise. By closely monitoring project performance and providing consistent support, the PMO enables projects to bridge strategy and execution, contributing to high-level reporting and governance as depicted in the illustration below.
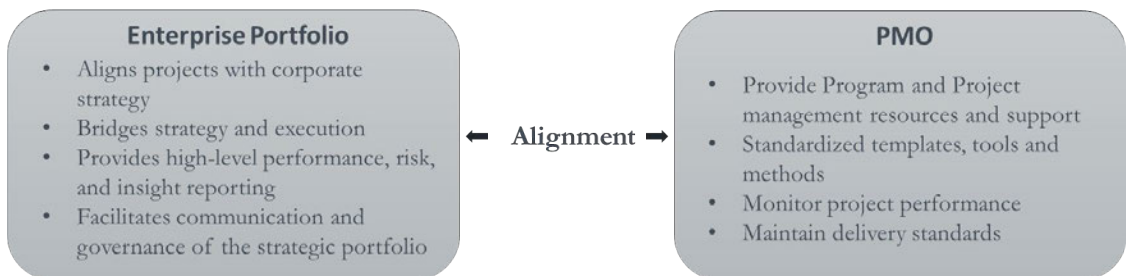
B. Project Prioritization

a. <u>Improve Project Prioritization Framework</u> – There is an opportunity to improve project alignment with corporate goals through the implementation of a structured project prioritization framework. The lack of such a framework has resulted in project teams facing the following challenges:

i. Delivery Teams Independent Task Priorities – Multiple Delivery teams set their own task priorities, complicating the ability to provide an accurate and unified project timeline.

ii. Delivery Team Challenges– Issues such as limited task visibility, communication breakdowns, and difficulty in coordinating task interdependencies often result in delays to project milestones.

iii. Resource Conflicts – Managing concurrent projects with shared resources creates inefficiencies and potential conflicts, further straining the project delivery.

b. <u>Focus on Operational Tasks</u> – Divisional and operational tasks often take priority, creating a gap between immediate demands and the long-term strategic focus required for successful project execution. As the diagram highlights, executive

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management sets the long-term vision, middle management aligns short-term tasks with strategic goals, and teams oversee day-to-day operations.

However, when operational priorities take precedence over strategic initiatives, it can disrupt the need to achieve both short- and long-term

> No matter how good the team or how efficient the methodology, if we are not solving the right problem (or focusing on the right engagements/tasks), the project fails.

C.   PMO Workforce Planning

The PMO is currently operating with a workforce that is heavily reliant on contracted resources. Out of a total project delivery staff, there are 17 contractors compared to only 4 FTE project managers (23% FTE and 77% contractors). In addition, there is only one project analyst, who occupies a critical role for supporting project execution and reporting. Several permanent staff members are also approaching retirement, which further compounds the risk of institutional knowledge loss and operational disruption.

> Leading PMOs implement proactive workforce planning with balanced FTE-to-contractor ratios, succession strategies, and cross-training to ensure continuity and resilience.

IMPACT:

A.   Formalized Operating Model

a. Without a formal mandate, the PMO at times struggles with awareness, adaption and acceptance of its decision-making authority, leading to fragmented governance, irregular practices, and stakeholder buy-in challenges, which impact efficiency and long-term success.

b. The lack of standardized processes and quality checks leads to inconsistent deliverables, potential errors, and delays, undermining project quality and the ability to meet deadlines.

c. Divisionally led projects may isolate themselves from securing PMO expertise and resources, causing below par project deliverables.

B.   Project Prioritization

a. Poor alignment with corporate goals can lead to resource conflicts, miscommunication, and delays, while clear processes and communication facilitate timely, priority-driven project delivery.

b. Prioritizing urgent tasks over strategic projects can impact deliverable quality. Balancing operational demands with long term project priorities affirms high-quality outcomes and sustained value.

C.   PMO Workforce Planning

The PMO's heavy reliance on contractors increases the risk of operational instability, reduced continuity, and potential knowledge gaps—particularly for strategic or long-duration initiatives. The limited number of FTEs and critical single-person dependencies (e.g., the sole project analyst) may result in delivery bottlenecks, overreliance on key individuals, and insufficient internal expertise to support decision-making. Additionally, anticipated retirements raise the likelihood of abrupt skill shortages and leadership voids, further affecting the PMO's ability to sustain performance over time.

AGREED ACTION PLANS:

A. Formalized Project Governance

BCLC will create a formal PMO mandate/charter to clarify roles and responsibilities, and a flowchart to guide PMO oversight decisions, ensuring consistent governance and improved project outcomes. This will help business units determine the level of PMO involvement required.

Messaging about PMO, its role, responsibilities, expertise and when to utilize services will be periodically communicated internally to BCLC personnel. This will assist heightened awareness and corresponding utilization of PMO.

B. Project Prioritization

In alignment with the Corporate Strategy, criteria for project prioritization will be established and implemented to ensure scarce allocation of resources are in alignment with strategic goals and long-term objectives. This effort will balance strategic and operational needs.

C. PMO Workforce Planning

People and Culture working with PMO and Enterprise Portfolio Management will review the permanent capacity needs of the PMO to adequately support strategic projects, PMO framework maturity, and support and scalability of contractors to ensure the successful delivery of the Strategic projects over the next 3 to 5 years.

RESPONSIBLE PERSON:

A. Formalized Project Governance – Gary Foster, Director Enterprise Services – Completion Date: March 31, 2026

B. Project Prioritization – Catrin Roberts, Director Enterprise Portfolio – Completion Date: September 30, 2026

C. PMO Workforce Planning – Gary Foster, Director Enterprise Services & Sarah Turtle, Director, People Engagement and Organizational Development – Completion Date: March 31, 2026

2. MAJOR PROGRAMS (PROJECTS) – OPPORTUNITY TO ADD FURTHER CONTROLS

> BCLC with a proactive mindset and being a leader in the industry, consistently has multi-year, multi-million-dollar projects, with an intent of maturing the organization in specific areas. Given the nature of these projects there invariably is a collaboration with vendors during development and implementation stage. Project examples are – Retail Transformation, FCS Evolution, Zero Trust, etc.

OBSERVATION:

These projects are initiated by the respective divisions. After funding approval, the PMO is engaged to manage and deliver the program. Due to the scope, volume, costs, resources, and downstream impact, the PMO along with relevant capability owners should consider implementing the following best practices during the execution stage:

A. Set Issue Resolution Expectation Upfront with Vendor

Invariably in most multi-year projects involving tremendous workload, there will be issues during the project life cycle. It is important to set expectations with the vendor upfront. This will enable issue management and issue resolution to occur relatively smoothly when challenges arise as opposed to a reactionary behaviour by both parties. Examples of issues are:

a. Unreasonably high defects during user acceptance testing (UAT).
b. Overlapping activities set by vendor to make-up time due to delays at their end.
c. Vendor lining up unreasonably high project activities to meet deadlines, without considering BCLC resource capacity or that there is a business to run outside the project.

B. Include Vendor Information/Risks in Periodic Status Updates

Given the tenure of these projects, there could be turnover of key vendor resources which can negatively impact project timelines, quality, and overall success. In the periodic vendor status update, along with project specific information there should be information and time set side to discuss vendor risks which highlights any concerns that can negatively impact the project.

C. Plan for Set-Back and Course Correction

For these mega, multi-year projects it is prudent to have the following two information available:

a. Who is the second option (option B) vendor for the project.
b. What is the latest stage within the project when the vendor can be switched (for any quality issues or other risks), if required and still achieve a successful project delivery.

If a situation arises during implementation stage with the primary vendor, the organization need not scramble to move the project forward or feel stuck with the vendor despite below par execution/delivery. Course correction becomes lot easier if the organization is prepared in advance for such scenarios.

D. "Challenge Function" Within Project Governance Committee

A resource should be earmarked to challenge information, deadline, decision-points, buffer time available, spend/cost, etc. At the project Governance Committee level there should not be a situation where most decisions requested are accepted seamlessly.

> PM must figure out everything that could go wrong, before it does.

There should be a healthy dialogue and pushback to validate everything important/critical is aligned. This challenge approach will prevent unpleasant surprises at the back end of mega projects and aid in successful completion.

E. Benefits Not Realized or Partially Realized

At the completion of the project the Governance Committee, Executives, and Board should be informed/presented with the value/benefits the project is aiding in realizing.

Simultaneously, in comparison to all the benefits listed upfront a list of unrealized or partially realized benefits should be prepared and reported. Further, a plan and timeline to act on these should be developed and worked on to ensure the organization realizes the full benefit of the project.

F. Educate Pertinent SLT members on PM Specifics

Although PMO in involved in mega projects, substantial ownership and leadership of PM is with the pertinent SLT member spearheading the initiative. However, their insights and knowledge specific to mega project management is limited as that is not their speciality.

PMO should play a hands-on role upfront in providing key PM tips/insights to the SLT, specifically in the following areas:

a. Specifics on RACI (Responsibility, Accountability, Consulting and Information).
b. Prior network integration to look for as the project is developed.
c. Resource capabilities and skills required for a successful project.
d. Any other information/detail the SLT member may require or request, specific to the project.

G. Portion of Vendor Payments Tied to Performance

A portion of vendor payment should be tied to the quality of their performance on the project. This will incentivise the vendor to push for higher quality performance which will benefit BCLC. Simultaneously, for a below par or lackluster performance BCLC can hold the vendor accountable, thus impacting the payments accordingly.

IMPACT:

Mega projects are extremely important and crucial for the future growth of the organization. Therefore, successful delivery of these projects is vital. If potential eventualities are not considered upfront and planned accordingly, then the project team will continue to be in a reactive mode as situations arise. This will negatively impact the project's success and the corresponding product quality being delivered.

AGREED ACTION PLANS:

Contract Management support for Major Programs

Contract management will work with PMO to create a framework for leveraging lessons learned and vendor specific experience within the Statement of Work / Contract Negotiation portion of the project. This should include performance-based payment schedules and clear issues resolution frameworks.

PMO Focus on Vendor Risks & Issues

The PMO will mature its governance framework to ensure consistency and efficiency across projects and programs with a focus on ensuring all vendor related risks and issues are adequately known and addressed.

Benefits Management Framework

Decision Support to work with Enterprise Portfolio to create a benefits management framework and reporting program to measure the forecast and actual benefits realization of projects and programs.

PMO Onboarding Program

To ensure appropriate education, alignment, and expectations are set with business stakeholders (SLT and ELT), the PMO will establish an onboarding or kick off program for all projects to ensure roles and responsibilities, approach, frameworks and process is understood by the pertinent sponsors.

RESPONSIBLE PERSON:

Contract Management support for Major Programs – Finance & Corporate Services & Safer Play & Enterprise Integrity – Completion Date: June 30, 2026

Contract Management support for Major Programs – Gary Foster, Director Enterprise Services – Completion Date: March 31, 2027

Benefit Management Framework – Alan Kerr, Chief Financial Officer and VP, Corporate Services – Completion Date: March 31, 2026

PMO Onboarding Program & PMO Governance Framework – Gary Foster, Director Enterprise Services – Completion Date: March 31, 2026

## 3. ENHANCING PM THROUGH ROLES AND COLLABORATION

Successful projects stem from strong collaboration between project managers and teams, where open communication and feedback are prioritized. A collaborative environment fosters knowledge sharing and continuous learning, driving success and efficiency.

OBSERVATION:

A. Integrating PMO in the Planning Process

The Statement of Work (SOW) phase is typically led by business units, with the Decision Support team managing business case and budget development. Project Managers have limited involvement during the early stage which leads to several impediments and misconceptions:

a. <u>Role Perception</u> – The PMO is primarily seen as focused on project execution rather than being involved in early planning (see diagram below for current state).

b. <u>Separation of Responsibilities</u> – Business units and Decision Support should focus on strategy and planning, while Project Managers only manage execution.

c. <u>Resource Allocation</u> – Project Managers are often not funded or assigned in the early planning stage, therefore there availability is an issue, thus creating gap with their involvement.
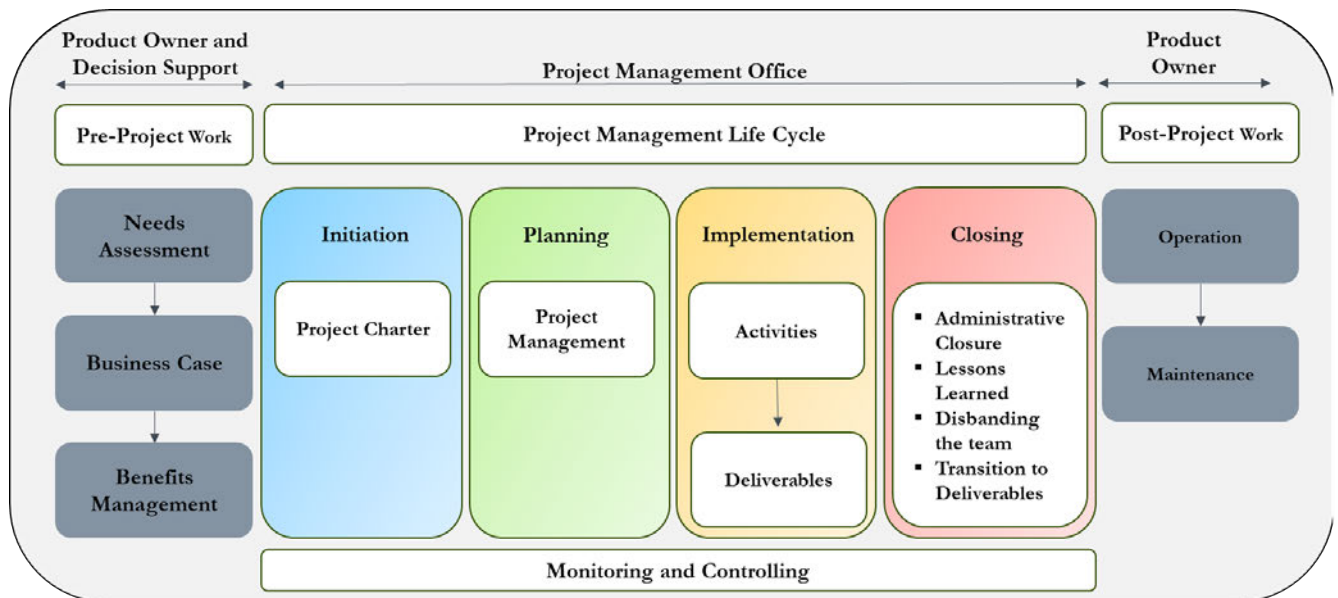
Integrating the PMO earlier in the pre-project phase would offer several benefits to BCLC:

a. <u>Incorporating Lessons Learned</u> – Leverage insights from past projects to inform the business case and budget, mitigating common risks/pitfalls.

b. <u>Practicality Assessment</u> – Utilize PMO expertise to ensure that business case, budget estimates, resource requirements, skills availability are realistic and achievable.

c. <u>Clear Metrics for Success</u> – Establish clear KPIs and success criteria within the business case to confirm effective evaluation.

Formalizing early PMO involvement, can improve strategic oversight, comprehensive understanding of project scope, and ultimately enhance project outcomes.

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B. Challenges Within Hybrid PM Approach

BCLC benefits from the flexibility of Agile delivery model combined with the stability and control of a hybrid project management approach. However, the role of the PM has evolved from overseeing individual projects to managing complex programs, such as Retail Transformation, FCS Evolution, etc., which include multiple projects with varying levels of complexity.

To effectively implement the hybrid project management approach, the organization should address certain key challenges:

a. <u>Role Ambiguity</u> – Project Managers may not be fully integrated into Agile activities or decision-making processes leading to a perceived separation from the Agile framework.

b. <u>Agile Independence vs. Project Alignment</u> – Product owners manage backlog and work prioritization, and Project Managers may be unaware of shifting priorities within the Agile Teams. For the Project Managers this creates disconnect between planned activities and ongoing work. It also impacts decision-making, coordination, and leadership.

c. <u>Project Complexity</u> – Teams often lack clarity about their responsibilities and how their work integrates with the broader project or other teams.

d. <u>Documentation vs. Agility</u> – As Agile responsibilities become more generalized, documentation often declines. It is essential to establish mechanism for tracking ownership and maintaining critical documentation.

C. Change Management in PMO and Divisional Led-Projects

Change Management (CM) is essential in guiding employees through transitions and ensuring smooth adaptation to new processes and systems. However, several factors are preventing full buy-in from employees regarding use of change management in project delivery:

a. <u>Limited Awareness</u> – The value and importance of CM is not widely recognized by key business stakeholders, leading to its late involvement in the project lifecycle.

b. <u>Neutrality Gap</u> – While project leads are skilled, their focus on project tasks limits their ability to provide a neutral perspective on CM.

c. <u>Absence of Formal Consultation</u> – There is no mandatory requirement for divisionally led projects to consult with CM during planning, execution or at completion stage.

d. <u>Limited Cross-Function Collaboration</u> – Limited collaboration among Agile, PMO, and CM teams hinders the development of a cohesive project delivery framework.

e. <u>Resource Constraints</u> – The CM team's capacity is stretched due to resource limitations and prioritization issues.

To address these difficulties, both the PMO and CM teams must collaborate more effectively throughout the project lifecycle, which can foster a more cohesive and aligned approach to project delivery.

IMPACT:

A. **Integrating PMO in the Planning Process**

Involving Project Managers late in the SOW and pre-planning phase can cause misalignment, unclear deliverables, unrealistic timelines, and poor risk management, impacting project success and oversight and the resulting success of the project.

B. **Challenges Within Hybrid PM Approach**

The hybrid approach's lack of alignment can lower project success, fragment processes, restricting collaboration, and complicate PMO management and oversight.

C. **Change Management in PMO and Divisional Led-Projects**

The PMO, Agile, and CM teams alone in isolation cannot achieve the desired outcomes. The obstacles impede the collaboration necessary for success.

AGREED ACTION PLANS:

A. **Integrating PMO in the Planning Process**

Measures will be taken to formally integrate PMO early into the process. This will enhance planning and oversight and the resulting success of the project.

B. **Challenges Within Hybrid PM Approach**

Roles, responsibilities, and collaboration between Agile teams and PMO will be defined, addressing issues with PM integration, communication, and alignment.

C. **Change Management in PMO and Divisional Led-Projects**

A change management framework will be created and socialized across the organization which will aid all divisionally led projects. The change management team will continue to ensure appropriate alignment of resources, promote collaboration, and educate teams on its value for sustainable outcomes.

RESPONSIBLE PERSON:

A. **Integrating PMO in Planning Process –** Gary Foster, Director Enterprise Services – Completion Date: March 31, 2026

B. **Challenges Within Hybrid PM Approach –** Gary Foster, Director Enterprise Services – Completion Date: March 31, 2027

C. **Change Management in PMO and Divisional Led Projects –** Sarah Turtle, Director, People Engagement and Organizational Development (with support from entire SLT team) – Completion Date: March 31, 2026

4. OPTIMIZING RESOURCES AND CAPACITY MANAGEMENT

> Strategic resource allocation is crucial for project success, ensuring effectiveness and efficiency. Key techniques include resource leveling, smoothing (when time constraints take priority), regular monitoring, and knowledge sharing. This approach ensures the right resources are available at the right time, avoiding over-allocation or underutilization.

OBSERVATION:

A. Transition Planning and Resource Allocation

a. <u>Transition Planning and PMO Training Enhancements</u> – The PMO relies on a mix of employees and contract Project Managers, providing flexibility to scale resources based on project demands. However, the onboarding and offboarding process requires strengthening that addresses the unique needs of different departments and functions, particularly given the use of complex technologies and systems.

> *The "P" in PM is as much about People Management as it is about Project Management.*

   i. On-boarding – Key areas for improvement include training on BCLC's Agile delivery model, Hybrid PMO framework, and complex technology and tools. New staff and contractors currently require significant time and resources to be project ready.

   ii. Off-boarding – Improving post-project offboarding and transition planning would assure team's ownership and accountability for maintaining operations of the Minimum Viable Product (MVP) and particulars of the descoped list.

As illustrated in the diagram, adopting a transition plan provides a structured framework to identify and develop internal talent for smooth transitions, continuity in key roles, and mitigate risks associated with turnover.

b. <u>Resource Management</u> – Projects encounter several challenges due to under-resourced project team and gaps in essential technical expertise. For example:

   i. Despite large-scale complex projects, project teams consistently operated with a relatively small staff, which limits the ability to meet key milestones and deliverables and highlights the need for better estimation of the skills and expertise required to successfully execute these initiatives.

   ii. Shortage of qualified/skilled professionals in critical roles, such as Quality Assurance (QA), Business Analyst (BA) positions or within the Agile Teams, impacts project progress, ultimately resulting in delays.

c. <u>Master Project List</u> – A list exists, and various projects are well tracked. However, there is one key aspect missing which is vital for overall successful project management:

   i. Interdependencies – Across the projects what are various interdependencies, namely resource, key skills required, tool, technology, etc. This information will aid in better and more efficient management of the projects.
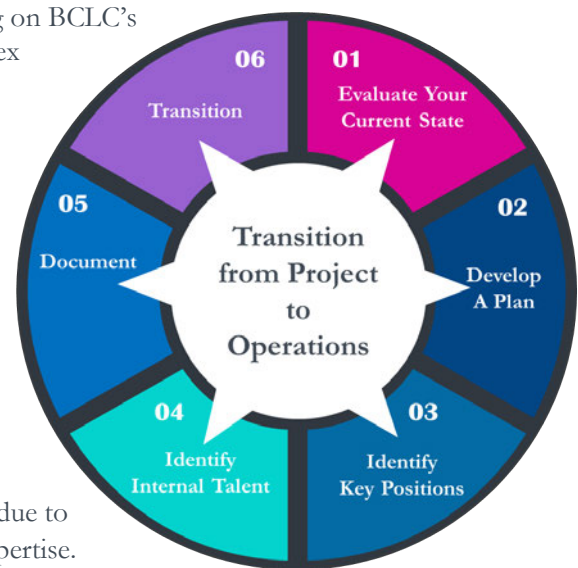
B. Education, Tools and Documentation

    a. <u>Agile Teams & Project Risk Management</u> – Project risk management is a critical focus area, with formal processes for risk/issue identification, assessment, mitigation strategies and regular review in PMO-led and divisionally led projects. However, in Agile teams, risk/issue management tends to be more informal, which can result in unclear risk ownership and inadequate documentation.

       There is an opportunity to further educate key stakeholders on utilizing ERMS tools and resources (enhance risk literacy), thereby enhancing risk identification and improve risk documentation throughout the project lifecycle. This would foster a more resilient project environment, better equipped to manage and mitigate potential risks.

    b. <u>Lack of Structured Training Program for Tools and Documentation</u> – Multiple tools, including JIRA, Confluence, and One Plan, are currently used to capture project-related information, creating decentralized project documentation processes and increasing the risk of inconsistencies. Furthermore, some tools were introduced mid-project, with teams adopting them based on familiarity and ease of use, rather than following a standardized approach. PMO encounters challenges due to lack of a structured training program for these tools.

> Training is not just about learning new skills. It is an opportunity to grow, innovate and excel together.

    c. <u>Complex Processes</u> – While structured compliance frameworks are essential for meeting standards and reducing regulatory risks, complex processes can be difficult to interpret (i.e. CAIR process). This can slow progress, increase the workload for project teams, and make it harder for new team members to get up to speed. Greater clarity and support are needed to help teams navigate requirements more efficiently, particularly at the start of a project.

IMPACT:

A.1. Transition Planning

Without proper documentation and knowledge transfer, valuable insights may be lost, risking the effectiveness and continuity of future teams.

A.2. Resource Management Capability

Limited resources make managing project scope difficult, leading to delays, and compromised quality.

B. Education, Tools and Documentation

Risk management is a must have and critical to any project. An informal risk management approach can delay/impact decision-making, and lead to reactive solutions.

Lack of structured training for project specific tools impact project quality and timeliness. Furthermore, impaired coordination due to late adoption also impacts project efficiency.

Detailed planning for documentation reduces flexibility and increases effort, limiting the team's ability to adapt to changes.

A.1. Transition Planning

Operational transfer will be formally addressed in project and program management frameworks and consistently applied across the PMO. Where required, for the transition of project to operations, key roles will be identified, talent assessed, gaps identified. The PM will work with the sponsor and propose a plan and assignment for the transition.

A.2. Resource Management Capability

For Resource Allocation, the Enterprise Portfolio team will be matured to provide a holistic enterprise view into capacity and resource allocation for projects, ensuring adequate resourcing is focused on priority initiatives.

B. Education, Tools and Documentation

Working with the Enterprise Systems team, the employee technology persona for Project Managers will be reviewed and shared with all relevant stakeholders. Best practices for tool usage and knowledge management will be identified and consistently adopted across the PMO.

RESPONSIBLE PERSONS:

A.1. Transition Planning and Resources Allocation – Gary Foster, Director Enterprise Services – Completion Date: March 1, 2027

A.2. Resource Capability – Catrin Roberts, Director Enterprise Portfolio – Completion Date: March 31, 2027

B. Education, Tools and Documentation – Gary Foster, Director Enterprise Services – Completion Date: March 31, 2026

5. PERFORMANCE MEASUREMENT AND POST-INVESTMENT ANALYSIS

Effective performance measurement and post-investment reviews are essential for successful project management. By tracking key metrics, organizations can ensure alignment with strategic goals, optimize resources, and identify potential issues early. This approach enhances transparency, accountability, and drives continuous improvement and innovation.

OBSERVATION:

A. Estimation, Budgeting, and Tracking

a. <u>Outdated Business Cases and Their Impact</u> – In the early stages of project planning, business units develop business cases based on initial assumptions and typically with an expectation that all scenarios and situations will transpire favorably. However, by the time of project commencement these business cases are already outdated and unrealistic.

This misalignment requires the PMO to repeatedly update business cases, KPIs, and at times project budgets to reflect current realities. The PMO also request additional budget from business units, who are frequently constrained by their own financial limitations. This ongoing budgetary tension can cause delays, misalignments, and complications in ensuring projects are executed appropriately.

b. <u>Evaluating Budget Performance</u> – Budget comparisons are between current budget and the most recent revision, without any reference to the original budget baseline. While this approach offers insight into short-term budget trends, it may lead to missed opportunities in budget readiness, including:

   i. Potential disconnects from the original budget expectation, impacting performance perception.

   ii. A skewed understanding of cost increases, which may impact the assessment of their magnitude.

   iii. Difficulty in identifying the root causes of budget variances, hindering effective problem resolution.

   iv. A reduced ability to apply comprehensive lessons learned from the project, limiting future improvements.

To optimize budget management, it is essential to maintain a consistent reference to the original budget baseline for more accurate analysis and decision-making.

c. <u>Project Health Assessment Beyond Funding</u> – Project health is currently tracked using a traffic light system, with the project status being classified as 'Green' primarily based on funding. However, this approach may overlook other critical project challenges, such as unresolved risks, unclear objectives, stakeholder satisfaction, resource/capacity and alignment with end-user requirements.

> A project health check process should provide "a clean bill of health" or identify areas requiring attention.

To ensure a more comprehensive evaluation, it is essential to document key decisions and incorporate broader criteria both quantitative and qualitative such as user satisfaction, operational alignment, and risk management, to maintain transparency and foster stakeholder trust.
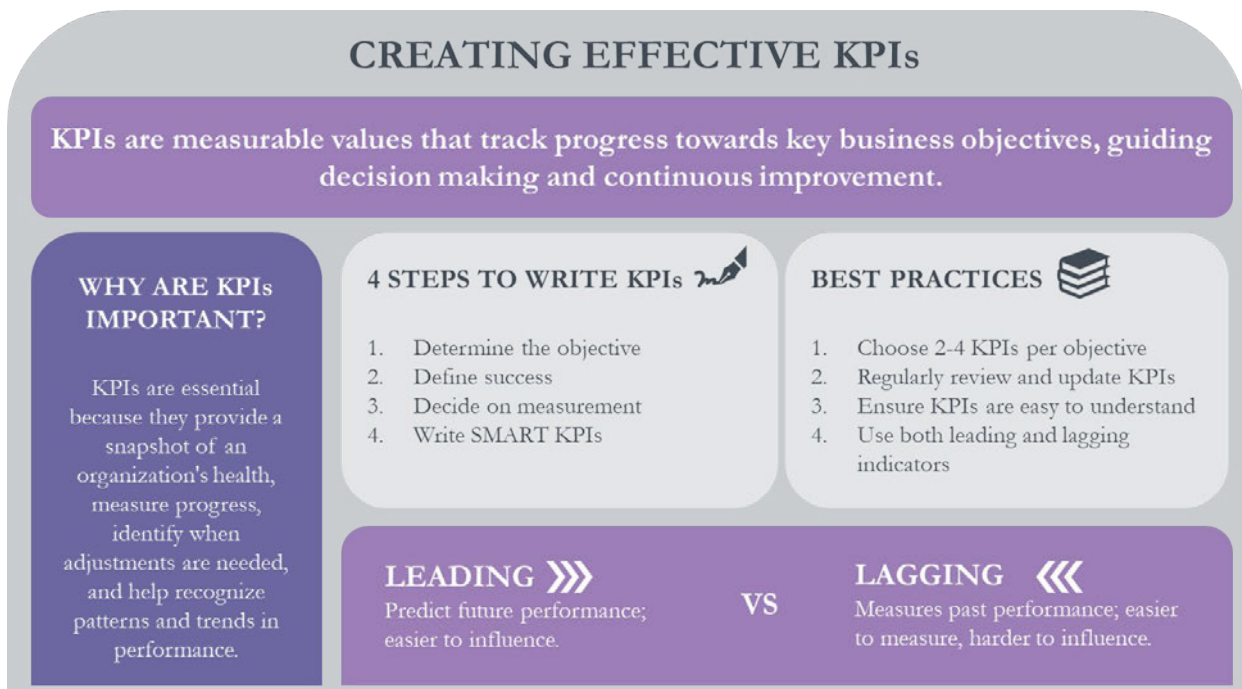
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B. Benefit Realization and Formal KPIs Tracking

a. <u>Benefit Realization</u> – Projects should be designed and managed to not only achieve their immediate objectives such as go-live, but also their long-term organizational value/benefits should be tracked. In the current set-up, the following gaps and opportunities were noted:

   i. Projects often finish before the benefits are seen, which makes measuring success harder.
   ii. Misalignment between the business case benefits and actual outcomes makes tracking and proving benefits realization challenging.
   iii. The Decision Support team, business units, and PM rarely request post-project assessments.
   iv. Benefits realization activities are not always visible or directly managed by the PMO, and assessing benefits is not typically within Project Manager role.
   v. BCLC lacks a mechanism to assess projects focused on operational efficiency, complicating success measurement.

> A project is complete when it starts working for you, rather than you working for it.

b. <u>Project KPIs</u> – KPIs are typically identified in the business case during the project planning phase. However, tracking and reporting of these KPIs are managed through informal channels, such as discussions and meetings with project stakeholders. Often, the focus is on project completion or reaching go-live stage, with less emphasis on creating a comprehensive KPI measurement framework that extends beyond the initial implementation.

As shown in the diagram below, it is essential to establish a strong framework for monitoring project performance against objectives. This helps ensure timely delivery, optimize resource use, and identify potential bottlenecks early to keep the project on track.

CREATING EFFECTIVE KPIs

KPIs are measurable values that track progress towards key business objectives, guiding decision making and continuous improvement.

WHY ARE KPIs IMPORTANT?

KPIs are essential because they provide a snapshot of an organization's health, measure progress, identify when adjustments are needed, and help recognize patterns and trends in performance.

4 STEPS TO WRITE KPIs

1. Determine the objective
2. Define success
3. Decide on measurement
4. Write SMART KPIs

BEST PRACTICES

1. Choose 2-4 KPIs per objective
2. Regularly review and update KPIs
3. Ensure KPIs are easy to understand
4. Use both leading and lagging indicators

LEADING »»
Predict future performance; easier to influence.

VS

LAGGING «««
Measures past performance; easier to measure, harder to influence.

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c. <u>Lessons Learned and Continuous Learning</u> – The goal is to capture valuable insights and foster a culture of continuous learning to enhance project success. However, within BCLC, project teams are unclear on whether lessons learned are part of continuous improvement efforts.

   i. There is inconsistent sharing of past project insights, thus missing opportunity to leverage prior experience.
   ii. Teams focus on current work instead of reflecting on past projects during lessons learned discussions.
   iii. There is no dedicated resource like "lessons learned champion", to integrate insights across projects.

   The diagram illustrates a widely accepted approach to capture lessons learned.
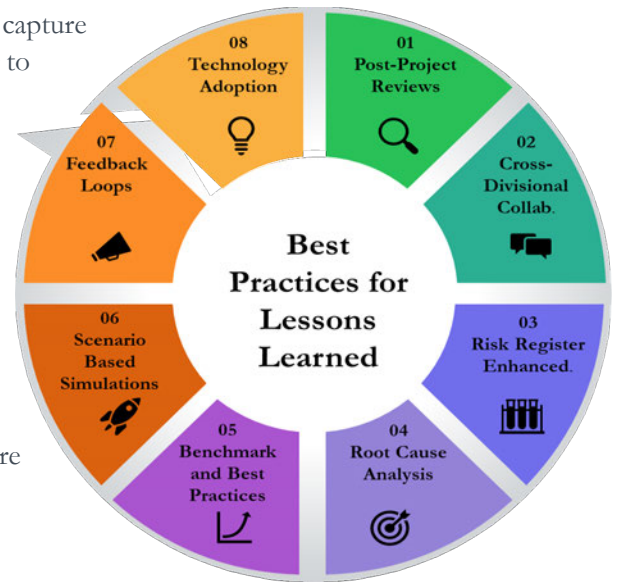
IMPACT:

A. **Estimation, Budgeting, and Tracking**

   a. Misalignment between early-stage business cases and project realities cause inefficiencies, as the PMO and Business Sponsors need to update business cases, KPIs, and budgets. Budget conflicts with business units' financial constraints lead to delays and challenges, impacting project execution.

   b. Not considering the initial budget when tracking variances can distort cost perceptions, leading to misinterpretations, inaccurate forecasting, and reduced accountability, undermining decision-making.

   c. Lacking a multi-dimensional project health assessment can lead to incomplete evaluations, increased risk, and lower stakeholder satisfaction, ultimately affecting project success.

B. **Benefit Realization and Formal KPI Tracking Framework**

   a. Without conducting comprehensive benefit realization, BCLC may struggle to access whether projects delivered the intended benefits, leading to ambiguity in evaluating project success.

   b. Due to lack of ongoing KPI measurement, long- and short-term project benefits may be missed, obstructing continuous improvement and accountability beyond implementation.

   c. Unclear lessons learned can lead to missed opportunities for leveraging past experiences, resulting in lost knowledge and hindering efficiency, quality, and collaboration in future projects.

AGREED ACTION PLANS:

A. Estimation, Budgeting, and Tracking

PMO Project reporting will be revised to include a more detailed, historical and trend-based view of budget. Lessons learned review will be formally integrated into the Project and Program management frameworks.

B. Benefit Realization and Formal KPI Tracking

A KPI / Benefits realization framework is to be established, tracked and made transparent. Capturing intended benefits from the initiation through to post go live stages of an initiative.

RESPONSIBLE PERSONS:

A. Estimation, Budgeting, and Tracking – Gary Foster, Director Enterprise Services – Completion Date: March 31, 2027

B. Benefits Realization and Formal KPI Tracking Framework – Finance & Corporate Services & Catrin Roberts, Director Enterprise Portfolio – Completion Date: March 31, 2027

6. ADDITIONAL ASPECTS FOR IMPROVING THE HYBRID PMO MODEL

OBSERVATION:

A. Application of the Divisional Led Projects (DLP) Framework Varies Across Different Areas

Interviews and observations of DLP revealed a lack of formal PM structure, with some teams unaware of the need for a framework. This resulted in varying approaches, inconsistent documentation, and inadequate tracking and reporting, misaligned with PMO practices. BCLC has an opportunity to educate teams on determining project size and applying consistent processes and documentation for all projects.

B. DLP Improvement Opportunities

Several previously noted observations also apply to DLP, as summarized in the table below. Further details on these observations are provided earlier in the report.

Observation Sections	Link for DLP
1. **Operating Model and Strategic Alignment for Project Excellence**	Focused on delivery of product/release, sacrificing governance.
	Gap in having a central repository for all DLP projects, limiting a unified strategic view of DLP initiatives.
	Disconnect in defining and aligning DLP with strategic and/or operational tasks resulting in potential inefficient resource use.
2. **Enhancing PM Through Roles and Collaboration**	There is a limited awareness and use of change management resources/principles.
3. **Optimized Resource and Capacity Management**	Not utilizing ERMS tools and training to improve skills in identifying, documenting, and managing project risks.
	DLP leaders lack of knowledge on complex process requirements (i.e. CAIR process), leading to insufficient planning for necessary approvals.
4. **Performance Measurement and Post Investment Analysis**	Shortfall in tracking/monitoring benefits realization, as well as setting and tracking KPIs
	Absence of a formal post-mortem process and lessons learned.

IMPACT:

An ad hoc approach to managing DLP can result in irregular documentation and unclear roles, leading to overlaps or gaps in accountability. Overall, this could affect the overall success of the project, and the resulting benefits expected for the organization.

AGREED ACTION PLANS:

A. Application of the Divisional Led Projects (DLP) Framework varies across Different Areas

All division leaderships will utilize the project management tool implemented by the PMO and are expected to reach out to the PMO, Change Management, and Portfolio Management for any questions, issues, or guidance regarding its use.

B. DLP Improvement Opportunities

To ensure compliance with core outputs, data points and artifacts of the DLP framework, Enterprise Portfolio will create a framework to capture data for DLP. This framework will ensure compliance with core requirements of tracking and reporting consistent with the DLP framework.

RESPONSIBLE PERSONS:

A. Application of the Divisional Led Projects (DLP) Framework varies across Different Areas – All SLT members responsible for divisionally led projects

B. DLP Improvement Opportunities – Gary Foster, Director Enterprise Services & Catrin Roberts, Director Enterprise Portfolio – Completion Date: March 31, 2027

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V.   Other Opportunities

The other opportunities section is provided for managements consideration. These are not gaps or issues within the current process in this area of operations. Audit Services will not be following up with management to determine if the aspects highlighted in the other opportunities section have been implemented. It is left to management's discretion.

7. PMO TO PROACTIVELY PRESENT KEY PROJECT DETAILS

For the successful implementation of the strategic plan the organization intends to actively work on multiple projects over the next five years costing over $500 million in total. Given the criticality of these projects to the organization's future growth/maturity and the corresponding spend associated, there is heightened Board interest in the progress of these projects.

Outside of all the other issues highlighted in this report, there is one more aspect PMO should consider as detailed below:

OBSERVATION:

Specific to Board reporting expectation, management could provide a comprehensive periodic update to both Executives and Board on the progress of major projects that meet the reporting threshold. Aspects PMO should consider, and present specific to projects are:

a.	Performance	e.	Issue Management
b.	Compliance	f.	Project Quality
c.	Financial	g.	Resource/Capacity
d.	Risk Management	h.	Conclusion & Overall Scorecard

Finally, for completed projects, "post implementation" information should also be included. This includes benefits realized, etc.

This reporting philosophy will ensure there are no surprises (especially negative), and proactive discussion will transpire from leadership and fiduciary duty perspective at Executives and Board levels.

Added benefits are, transparency and details will provide great education/information to the Board on the magnitude of project work the organization has undertaken to be industry leaders. This is beyond the operations duties of generating over $2.5 billion annually, meeting all regulatory and compliance requirements from GPEB and FINTRAC, obtaining clean audit reports (GITC, SOC and external financial statements audit), maintaining healthy relationship with Casino Service Providers at 37 sites and retailers at over 3,200 locations, etc.

This knowledge and understanding of inner working of the organization will facilitate greater trust and appreciation for the work the organization has performed/delivered on for the players and the province.

Appendix I - Importance of Project Management Oversight

A PMO is essential for maintaining organizational efficiency, strategic alignment, and successful project execution. One of its primary functions is to provide a **standardized approach** to managing projects across BCLC. By **establishing consistent methodologies, tools, and processes,** the PMO ensures that all project teams follow best practices, leading to greater predictability and control over project outcomes. This consistency reduces the risk of delays, budget overruns, and quality issues by providing a clear roadmap for project execution, from initiation to closure.

The **PMO also plays a critical role in governance, offering oversight** to ensure that projects are aligned with the organization's strategic objectives. By regularly monitoring project performance, budgets, timelines, and risks, the PMO ensures that projects remain on track and meet KPIs. This **governance framework allows BCLC to make data-driven decisions**, adjust priorities as needed, and allocate resources efficiently, ensuring that the most important projects receive the attention and support they require.

Risk management is another key function of the PMO. Through proactive risk identification and mitigation strategies, the PMO helps minimize the likelihood of project failures. This can involve developing contingency plans, establishing risk thresholds, and ensuring that risks are communicated effectively to stakeholders. By centralizing risk management efforts, the PMO enables a more comprehensive view of potential difficulties across BCLC, allowing for **quicker responses to emerging issues**.

Additionally, the PMO promotes transparency and accountability by providing a clear reporting structure. **Regular status updates, performance dashboards, and progress reports give senior management and other stakeholders a real-time view of how projects are progressing,** allowing them to make informed decisions. This open communication fosters trust and collaboration between project teams, leadership, and clients.

A well-functioning **PMO also facilitates resource management** by coordinating the allocation of personnel, finances, and tools across multiple projects. This helps ensure that resources are used optimally and that no project is left under-resourced, reducing bottlenecks and inefficiencies.

Moreover, **PMO fosters continuous improvement by capturing lessons learned from completed projects and integrating them into future efforts.** By analyzing past successes and challenges, the PMO helps refine processes and drive innovation, contributing to long-term BCLC growth. This focus on learning and development ensures that the organization becomes more agile and adaptable over time, better equipped to handle evolving market demands and internal changes.

In summary, PMO acts as the backbone of project execution within an organization, providing structure, oversight, and continuous improvement to enhance project success and ensure alignment with broader business goals.

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Appendix II - Best Practices Toolkit

The Best Practices Toolkit, outlined in the table below, evaluates BCLC's PMO against industry benchmarks. It highlights specific criteria, performance metrics, and actionable insights to assess current practices, & gaps.

Such evaluations facilitate measurable progress and aids in continuous improvement of the PM practice.

PROJECT MANAGEMENT BEST PRACTICES TOOL KIT

Legend:
- 🔴 No evidence/not consistent
- 🟡 Room for improvement
- 🟢 Consistently done

PMO Governance and Structure

BCLC Rating	#	Description
🔴	1	Clearly defined the PMO's mission and objectives aligned with organization's strategic goals
🟡	2	Established and documented PMO roles and responsibilities (project managers and stakeholders)
🔴	3	Developed a PMO Charter (outlining its scope, authority, and governance model)
🟡	4	Standardized project management methodologies (Agile, Waterfalls, hybrid) and applied consistently across the organization
🟡	5	Defined a project approval process for initiation of projects, including the criteria for priortization and resource allocation

Project Planning and Execution

BCLC Rating	#	Description
🟢	1	Created standardized project templates and tools for planning, scheduling and tracking
🟢	2	Developed and implemented project management frameworks (stage-gate process, milestones, and deliverables tracking)
🟢	3	Ensured project charters are created at the start of every project, including objectives, scope, stakeholders, and timelines
🔴	4	Used a formal project kick-off process to ensure alignment between all stakeholders are clearly communicate project goals and exceptions
🟢	5	Monitored key project performance metrics such as budget adherence, timeline adherence, and resource utilization

Resource and Capacity Management

BCLC Rating	#	Description
🟡	1	Established resource management processes for optimal allocation of personnel, technology, and finances across projects
🟢	2	Maintained a centralized resource pool and ensure real-time visibility of resource availability and capacity
🟡	3	Monitored resource utilization and balance workloads to avoid bottlenecks or underutilization across multiple projects
🔴	4	Developed a training and development plan to improve project management skills and capabilities within the organization

Risk Management

BCLC Rating	#	Description
🟢	1	Established a risk management framework that includes risk identification, assessment, mitigation strategies, and monitoring
🟢	2	Developed a risk registry for all projects and ensure risks are regularly reviewed and updated
🟢	3	Implemented an escalation process for issues that cannot be resolved at the project level and require executive involvement
🟢	4	Conducted regular risk assessment at key stages of each project to identify emerging threats or challenges

Communication & Stakeholder Engagement

BCLC Rating	#	Description
🟡	1	Developed and maintained a project portfolio dashboard to track KPIs such as budget, timeline, and quality metrics
🔴	2	Regularly assessed project performance against predefined success criteria, including ROI, alignment with strategic goals, and stakeholder satisfaction
🟡	3	Implemented a project audit process to ensure adherence to PMO standards and identify areas for improvement
🟢	4	Provided executive-level reporting to ensure visbility into the status of projects aand the overall project portfolio

Performance Monitoring and Reporting

BCLC Rating	#	Description
🟡	1	Developed and maintained a project portfolio dashboard to track key performance indicators (KPIs) such as budget, timelines, and quality metrics
🔴	2	Ongoing assessment conducted on project performance against predefined success criteria, including ROI, alignment with strategic goals, and stakeholders satisfaction
🔴	3	Implemented a project audit process to ensure adherence to PMO standards and identified areas for improvement
🟡	4	Provided executive-level reporting to ensure senior management have visibility into the status of projects and the overall project portfolio

PROJECT MANAGEMENT BEST PRACTICES TOOL KIT (CONTINUE)

🔴 No evidence/not consisent

🟡 Room for improvement

🟢 Consistently done

Continuous Improvement

BCLC Rating	#	Description
🟡	1	Implemented a formal change management process for project scope, schedule, or budget adjusments, ensuring that all changes are properly evaluated and approved
🟡	2	Captured and documented lessons learned at the end of every project and incorporate them into future project planning and execution
🟡	3	Encouraged a culture of continuous improvement by reviewing PMO performance and making adjustments to methodologies and tools as needed
🟡	4	Conducted regular process reviews and updates to ensure PMO practices evolve with changing business needs and industry trends

Training/Knowledge sharing

BCLC Rating	#	Description
🟡	1	Created a knowledge-sharing platform or respository for project management resources, templates, and documentation
🟡	2	Developed ongoing training programs to enhance project management skills within the organization, ensuring adherence to PMO processes and methodologies
🟡	3	Encouraged cross-project learnings by sharing best practices, challenges, and successes across project teams and departments
🟡	4	Mentored and coached project managers to build their capacity and ensure they adhere to the PMO's standards and methodologies

Technology and Tools

BCLC Rating	#	Description
🟡	1	Selected and maintained appropriate project management software that integrates with other business tools and systems (e.g. Microsoft Project, JIRA, etc.)
🟡	2	Ensured all project teams use the same project managmeent tools for tracking purposes, managing resources, and reporting
🟡	3	Implemented collaboration tools to support communications and document sharing across projects (e.g. Slack, Teams, etc.)
🟡	4	Automated reporting and dashboards where possible to provide real-time status and performance data to stakeholders

PMO Assessment and Maturity

BCLC Rating	#	Description
🟡	1	Assessed the maturity level of the PMO on a regular basis using recognized models
🔴	2	Set improvement goals to move the PMO to higher level of maturity, with more sophisticated processes and better integration with organizational strategy
🟡	3	Benchmarked PMO performance against industry standards to identify areas for growth and improvement
🟡	4	Seek stakeholder feedback on the effectiveness of the PMO and adjust practices based on inputs

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Appendix III - Description of Systems & Terms Referenced

System	Description
Jira	Used in software development for the purpose of tracking and managing tasks, projects, and issues
Confluence	Collaboration and documentation tool. Helps teams to create, share and collaboration on content, documents, project plans, meeting notes, and more.
OnePlan	Provides a unified platform for planning, executing, and monitoring projects.

KEY TERMS

CAIR	–	Compliance Assessment Review Process
DLP	–	Divisionally Led Projects
ELT	–	Executive Leadership Team
ERMS	–	Enterprise Risk Management Services
KPIs	–	Key Performance Indicators
MVP	–	Minimum Viable Product
PM	–	Project Management
PMO	–	Project Management Office
SLT	–	Senior Leadership Team
SOW	–	Statement of Work
UAT	–	User Acceptance Testing

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