FOR CONSIDERATION
August 11, 2021

TO: The Board of Trustees
FROM: Thomas Falcone
SUBJECT: Consideration of the Adoption of a Project Implementation Plan for the Capital Budget Process Improvement Recommendations

Requested Action

The Board of Trustees (the “Board”) of the Long Island Power Authority (“LIPA”) is requested to adopt a resolution, attached hereto as Exhibit “A”, approving the Project Implementation Plan (“PIP”) for the for the Capital Budget Process Improvement Recommendations.

Background

The Capital Budget Process Improvement Recommendations were developed following LIPA and PSEG Long Island efforts to improve the Operating Budget development and oversight process. The existing Capital Budget development and project oversight process shared many of the same weaknesses as the Operating Budget process. PSEG Long Island’s requests for Capital Budgets are routinely in excess of the funds expended. In addition, there is a high level of variance between the funds requested for the year by project and category as compared to those expended, with the result of large shifts between projects and categories of spending from those planned and approved by the Board. This leads to a loss of accountability for project delivery and controls, as well as can result in higher borrowing costs for customers. Further, prior Management Audits have pointed to needed reforms in capital project optimization, capital project estimating, risk and contingency management, project management performance reporting, the definition and quantification of work standards, and other areas that contribute to the development and management of capital projects and the Capital Budget.

An improved process governing Capital Budget and Capital Project review and approval, including managing changes during the year, will enhance transparency and accountability of customer funds and ensure adequate information flow to LIPA to conduct oversight on behalf of our customers.

Board Recommendations to PSEG Long Island

On May 19, 2021, Board adopted recommendations in the following areas:

- **Complete Project Justification Descriptions**: For a project to be considered by the Board for inclusion in the LIPA Board-Adopted Consolidated Budget and any project added during the year.

- **Preliminary Project Justification Descriptions**: If PSEG Long Island is unable to provide
a full and complete PJD prior to consideration of the PSEG Long Island Capital Budget by the LIPA Board, PSEG Long Island may submit a preliminary PJD as part of its Capital Budget request. LIPA may recommend to the Board that the project be included in the LIPA Consolidated Capital Budget on a contingent basis, therefore outside of the PSEG Long Island Capital Budget.

- **Annual Project Justification Description Updates:** PSEG Long Island should provide LIPA with annual updates to PJDs highlighting changes from the prior PJD and reflecting the current cost estimates, including risk and contingency, schedule, and scope details as part of the annual budget process.

- **Capital Budget Reallocation Explanations:** To fulfill PSEG Long Island’s obligation to consult with LIPA prior to reallocating budgeted funds, PSEG Long Island must submit to LIPA a Capital Budget Reallocation Explanation form.

- **Carryover Projects:** If a Capital Project funded within the Adopted LIPA Consolidated Capital Budget is delayed into the subsequent year’s Capital Budget, PSEG Long Island must identify the change in the project schedule and propose to carryover the approved Capital Budget funds from the current adopted Capital Budget to the proposed Capital Budget as part of the next year’s Capital Budget adoption process.

On July 19, 2021, PSEG Long Island submitted to LIPA Staff a PIP for the recommendations described above. After review and discussion among PSEG Long Island and LIPA Staff, LIPA Staff recommends adoption of the PIP as set forth in **Exhibit “B.”**

**Recommendation**

Based upon the foregoing, I recommend approval of the above requested action by adoption of a resolution in the form attached hereto.

**Attachments**

- **Exhibit “A”** Resolution
- **Exhibit “B”** Project Implementation Plan
RESOLUTION ADOPTING AN IMPLEMENTATION PLAN FOR THE CAPITAL BUDGET PROCESS IMPROVEMENT RECOMMENDATIONS

WHEREAS, pursuant to Section 4.4(16), Rights and Responsibilities of LIPA, of the Amended and Restated Operations Services Agreement (“OSA”), LIPA, in part, has the right to “make recommendations to the Service Provider, in each case as may be reasonably necessary or appropriate to perform LIPA’s oversight responsibilities and obligations with respect to the provision of Operations Services under this Agreement and as may otherwise be necessary or appropriate to comply with LIPA’s legal, contractual and fiduciary obligations. . .”; and

WHEREAS, pursuant to Section 5.2 (B), Pass Through Expenditures: Budgets of the OSA, requires PSEG Long Island to submit the proposed Consolidated Budget for LIPA’s review, revision, and approval, which includes the PSEG Long Island Operating and Capital Budgets; and

WHEREAS, Section 4.13 (A) of the OSA requires PSEG Long Island to include in each such Capital Budget a description of each capital project constituting Capital Improvements in sufficient detail to enable LIPA to make a fully informed analysis and assessment thereof, including (i) the project location, (ii) the planned initiation date and expected duration, (iii) an estimate of the amount of the costs including the dollar amount per year if the project requires more than a year to complete, (iv) an explanation of the relationship to other planned or subsequently required Capital Improvements, (v) the anticipated useful life of each Capital Improvement and (vi) the economic and engineering justifications for such project; and

WHEREAS, Section 5.2 (B) obligates PSEG Long Island to consult with LIPA prior to any reallocation of budgeted funds; and

WHEREAS, on May 19, 2021, the Board adopted Capital Budget Process Improvement Recommendations, as described in the accompanying memorandum, and directed PSEG Long Island to submit a Project Implementation Plan (“PIP”) to address the recommendations; and

WHEREAS, on July 19, 2021, PSEG Long Island submitted to LIPA Staff a PIP for the recommendations described in the accompanying memorandum, and after review and discussion amongst PSEG Long Island and LIPA Staff, LIPA Staff has recommended adoption of the PIP as set forth in Exhibit “B.”

NOW, THEREFORE, BE IT RESOLVED, the Board hereby adopts the PIP for the Capital Budget Process Improvement Recommendations, as described in the accompanying memorandum and as set forth at Exhibit “B”;

BE IT FURTHER RESOLVED, that the Board directs LIPA Staff, together with PSEG Long Island, to report to the Board on the completion of the PIP no less than quarterly until completion.

Dated: August 11, 2021
PSEG Long Island

Project Implementation Plan

for

Capital Budget Development and Monitoring Process Improvements

Recommendation No. 1

Project Title: Capital Project and Budget Review and Approval Process
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1. Project Definition

The primary motivation for this project is to formally document existing practices as well as expand and strengthen the current Capital Project and Budget Review and Approval Process. This initiative will help enhance the documentation and transparency supporting the current Capital Project and Budget Review and Approval Process. PSEG Long Island would like to note that the following documents supporting this process are provided to LIPA currently on a monthly or recurring basis:

- Documents Reviewed and Approved by the PSEG Long Island Utility Review Board (“URB”), comprised of PSEG Long Island employees, including:
  - Capital projects must obtain PSEG Long Island URB approval before any funding is expended
  - URB documents are uploaded to a LIPA SharePoint site after each URB meeting
  - Mid-year Line of Business (“LOB”) report-outs to the URB covering projects and status on scope, schedule, and cost
- Capital Budget Plan vs. Actual Variance Explanations at the budget category level
- Projected Year-End (“PYE”) Forecasts by Project
- Project Description for any new project that receives charges (in support of Bond Report used by LIPA to evaluate tax-exempt financing qualified property)

Furthermore, the Transmission and Distribution business units, which constitutes approximately 85% of the total PSEG Long Island Capital Budget, provides the following additional support:

- Detailed PYE variance explanations by Project
- Responses to any LIPA question regarding submitted PYE variance explanations
- Project Justification Descriptions (“PJD”) for any new emerging projects

1.1. Project Purpose, Objectives, and Success Criteria

**Purpose:**
The purpose of this project is to formerly document existing practices as well as expand and strengthen the current Capital Project and Budget Review and Approval Process.

**Scope:**
The scope of this project is to document the annual process related to the Capital Project and Budget/8-year Financial Plan review for the budget submission and subsequent updates to projects and budgets.

The specific business units/capital categories this document is applicable to are the following:

<table>
<thead>
<tr>
<th>Business Area</th>
<th>Capital Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmission and Distribution</td>
<td>• Regulatory Driven</td>
</tr>
<tr>
<td></td>
<td>• Load Growth</td>
</tr>
<tr>
<td></td>
<td>• Reliability</td>
</tr>
<tr>
<td></td>
<td>• Storm Hardening</td>
</tr>
<tr>
<td></td>
<td>• Economic, Salvage, Tools, Equipment &amp; Other</td>
</tr>
<tr>
<td>Information Technology</td>
<td>• T&amp;D Related IT System</td>
</tr>
<tr>
<td></td>
<td>• Upgrades/New</td>
</tr>
</tbody>
</table>

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Each of the business units specified above will submit Project Justification Descriptions ("PJDs") for any capital projects that require funding for the upcoming budget year. For the following project types, the below projection will be submitted:

- Specific Projects – PJDs include multi-year financial forecast
- Blankets / Programs – PJDs include upcoming year financial forecast only

The PJD templates will be mutually agreed to by LIPA and PSEG Long Island. The current PJD templates include the following information listed below.

- Project Location
- Schedule - initiation date and expected duration
- Cost Estimates by Year
- Long Term Plan
- Justification

The Joint PSEG Long Island and LIPA capital working group will assess any future enhancements to the PJDs, including providing additional financial information (Total Project Cost and Estimate to Complete, Basis of Estimates, level of confidence and/or cost estimate category, and costs itemized by category including in-house labor, contractor, Risk and Contingency), Scope, Benefits, Schedule, Operating Budget impact statement, and a review of affected stakeholders and community outreach plan.

Objectives:

- Improve documentation of planning process
- Optimize allocation of resources to provide the highest benefit to customers
- Enhance business decision making
- Provide for accountability in project implementation

Project End State and Success Criteria:

The project end state is to have all relevant Capital budgeting documentation submitted to LIPA in the appropriate timeline during the annual budget process and until the project achieves beneficial use. The Capital budgeting documentation as well as potential update scenarios are outlined in detail below.
**Project Implementation Plan for Capital Budget Development and Monitoring Process Improvements**  
**LIPA Recommendation No. 1**

| Annual Capital Budget in accordance with the Budget Development Schedule. The PSEG Long Island Lines of Business are: - T&D - Information Technology - Customer - Facilities - Fleet | Development Schedule | prior to the Final Capital Plan submission to LIPA, thereby providing LIPA with sufficient time to review. The PJD template will be mutually agreed to by LIPA and PSEG Long Island. It may be necessary to use an interim template for 2022 and continue to refine for use for the 2023 budget development process. |
| PJDs will be submitted for any capital project that requires funding for the upcoming budget year. For Specific Projects, the PJD will include a multi-year financial forecast through project completion. For Blankets and Programs, the PJD will include the upcoming year financial forecast only. |  |

**Please note:** The PJDs will be derived from PSEG Long Island’s SOS system to the extent available. Requests to modify the PJD structure for additional information not currently a component of the SOS system will need to be captured as future process improvements and will not be available for the 2022 budget cycle.

**Preliminary Project Justification Descriptions:** If PSEG Long Island is unable to provide a full and complete PJD, as described above, prior to consideration of the PSEG Long Island Capital Budget by the LIPA Board, PSEG Long Island may elect to submit a Preliminary PJD as part of its Capital Budget request. LIPA may elect to place Capital Budget funds for these projects in a separate Pending Project Authorization Funds budget category outside the PSEG Long Island Capital Budget.

Please note, PSEG Long Island has no obligation to proceed with a project (at the beginning of a new year or mid-year) unless funding is made available consistent with the OSA.

**PJDs Not Approved by LIPA:** If, following LIPA’s analysis and assessment of the Capital Project and PJD, LIPA does not approve the project; PSEG LI can accept LIPA’s recommendation and revise the Project and PJD to address LIPA’s concerns. If the project remains unapproved, to the extent PSEG LI

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**Project Implementation Plan for Capital Budget Development and Monitoring Process Improvements**  
**LIPA Recommendation No. 1**

| believes an unapproved project is necessary to meet strategic goals or metrics and LIPA does not agree. PSEGLI may initiate a Dispute Resolution process about whether such project is needed to meet the Scope Function-Specific Performance Metrics (“Budget Criterion”) pursuant to the expedited arbitration provisions of the OSA. |  
|---|---|

**Changes to Project Post-PJD Submission:** In the event a change in a project’s scope, schedule or cost arises during the year in an approved PJD, PSEG Long Island will identify and highlight the change to LIPA in a summary report of such changes as part of the URB report. The URB report will continue to be provided to LIPA immediately following the URB meeting. Further, PSEG Long Island will need to provide supporting information or formally brief LIPA on changes at LIPA’s request. If LIPA deems the changes to be material, LIPA can request PSEG Long Island submit an updated PJD. | As needed |

**Projects Reflected Only in Future Years of 8-year Financial Plan:** In support of projected Capital Projects that are reflected only in the future years of the Capital Financial Plan with no financial impact to the current or upcoming Proposed Capital Budget, PSEG Long Island will provide LIPA with a brief description of the project, summarizing the scope and justification. | Annually pursuant to the Budget Development Schedule |

**Mid-year New Projects (No Budget Amendment Required):** In the event that an operational need arises to implement a project that was not included in the approved PSEG Long Island Capital Budget and PSEG Long Island proposes using reallocated funds from the already approved PSEG Long Island Capital Budget to fund the new capital project, PSEG Long Island shall submit a PJD to LIPA for review and approval. This process will begin in 2022.  
**Please note**, budget funding in the current year for a project that has been delayed and funds will be required in future years cannot be reallocated to fund a new/emergent project without LIPA’s approval as described below. | As needed. PJDs would be submitted to LIPA following URB approval of the new project for inclusion in the current Annual Capital Budget. |

**Mid-year New Non-storm Emergency Projects (Budget Amendment Required):** In the event that an operational need arises to implement a project that was not included in the approved PSEG Long Island Capital Budget | As needed. PJDs would be submitted to LIPA following URB approval of the new project for inclusion in the current Annual Capital Budget. |
and an amendment is needed, PSEG Long Island must submit a PJD for the newly arising project for LIPA’s review and approval, which shall not be unreasonably withheld. The budget for the current year will be amended for the costs, as Non-Storm Emergency Expenses, to the extent that LIPA determines that such costs cannot be funded by the unexpended costs of LIPA-approved delays or cancellations of other projects, initiatives, or scopes. The budget for the current year and subsequent year will be adjusted to reflect carry over expenditures aligned with the deferred project scope for approved delays. This process will begin in 2022.

### Mid-year Increase in Existing Project

**Projected Year-end Funding Requirements (“PYE”):** If the PYE or actual spending for a project is projected to be above or below the original project level funding as reflected in the approved Annual Capital Budget, PSEG Long Island needs to identify and highlight the change to LIPA in a summary report of such changes as part of the post-URB report immediately following the meeting. Further, if the amount of the change exceeds the threshold of 10% and $2.5 million, PSEG Long Island needs to provide LIPA with a Reallocation Explanation.

| **As needed** | **The Reallocation Explanations must address:** The reason for increasing a project’s funding. Why the adopted budget did not anticipate the issue. And an aggregate quarterly forecast of all projects reflecting the impact of corrective actions to remain within the Annual Capital Budget funding levels. |

### Carryover Projects:*

In the event that an approved project is delayed for reasons beyond the Service Provider’s reasonable control (e.g. permit delays), the budget for the current year and subsequent year will be adjusted to reflect carry over expenditures for approved delays.

PSEG Long Island can reprogram funds made available in the current Annual Capital Budget that results from project delays to fund the acceleration of project scope from a future year of the Capital 8-year Financial Plan which are covered by a LIPA approved PJD (resulting in a neutral Budget impact).

| **As needed and pursuant to Budget Development Schedule** | **PSEG Long Island and LIPA working group to discuss specific process to meet requirements, but maintain operational needs** |

### Project Deliverables:

Project deliverables are outlined below.
## Deliverable

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Delivery Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete PJDs for 2022 Budget</td>
<td>Due annually on a rolling basis starting August 1 with final PJDs received no later than September 21</td>
<td>As described above</td>
</tr>
<tr>
<td>URB Summary Report for Change in a Project’s Scope, Schedule, or Cost</td>
<td>Effective January 2022 with submission following each URB meeting.</td>
<td>PSEG Long Island will identify and highlight the change to LIPA in separate summary report of such changes as part of the URB report. The URB report will continue to be provided to LIPA immediately following the URB meeting. Further, PSEG Long Island will need to provide supporting information or formally brief LIPA on changes at LIPA’s request. If LIPA deems the changes to be material, LIPA can request PSEG Long Island submit an updated PJD.</td>
</tr>
<tr>
<td>URB Summary Report for Mid-Year Increase in Existing Project PYE</td>
<td>Effective January 2022 with submission following each URB meeting.</td>
<td>PSEG Long Island needs to identify and highlight the change to LIPA in a separate summary report of such changes as part of the post-URB meeting report. Further, if the amount of the change exceeds the threshold of 10% and $2.5 million, PSEG Long Island needs to provide LIPA with a Reallocation Explanation.</td>
</tr>
<tr>
<td>Improved PJD Template for 2023 Budget in SOS Tool</td>
<td>June 2022</td>
<td>The PJD template will be mutually agreed to by LIPA and PSEG Long Island. PSEG Long Island will work to accommodate LIPA requested refinements to the PJD template in time for the 2023 Capital Budget development process. The Budget Working Group will oversee the PJD template revisions.</td>
</tr>
<tr>
<td>PSEG Long Island submits a request to Carryover Capital funds from the current Capital Budget to the Capital Budget under development, aligned with deferred scope.</td>
<td>As needed and pursuant to Budget Development Schedule but no later than October 1st</td>
<td>The carryover process will be in accordance with the procedure outlined above.</td>
</tr>
</tbody>
</table>
1.2. Assumptions, Dependencies, and Constraints

Project Assumptions: 
This section is not applicable

Constraints
Potential constraints exist to expand the current PJD process to additional business units. The implementation of a new process typically includes challenges of training and understanding of the new process. Also, some of the additional information LIPA has requested to be included in PJDs may not be feasible in time for the 2022 Budget Development process. Nevertheless, PSEG Long Island will work to address LIPA’s PJD requests for 2022 by either modifying the form or developing a work around solution. Changes that cannot be accommodated for 2022 will be identified and addressed for the 2023 budget process.

Please note: The current PJDs will be derived from PSEG Long Island’s SOS system. Special requests for additional information not currently captured in the SOS system will need to be captured as future process improvements and will not be available for the 2022 budget cycle.

2. Project Structure

2.1. Internal Project Organization

Internal Project Organization

<table>
<thead>
<tr>
<th>Group/Individual</th>
<th>Role/Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Budgeting Group</td>
<td>• Train and educate business units who are new to this process and how to properly complete a PJD</td>
</tr>
<tr>
<td></td>
<td>• Coordinate and assist business areas in completing PJDs</td>
</tr>
<tr>
<td></td>
<td>• Submit to LIPA required PJDs, along with the Capital Project Listing as required for the annual budget process</td>
</tr>
<tr>
<td></td>
<td>• Track any documents that are reviewed and approved by the PSEG Long Island URB that are applicable to the following:</td>
</tr>
</tbody>
</table>
The PJDs are part of a larger overarching initiative to improve the budgeting process as a whole. This initiative is a joint, collaborative effort between PSEG Long Island and LIPA. As such, these two organizations will be working together to develop and outline the process to be followed to achieve this initiative.

The project will utilize the previously created Joint PSEG Long Island and LIPA Budget Steering Committee that will meet at least once a month, and as necessary:

**Capital Budget Steering Committee**

<table>
<thead>
<tr>
<th>PSEG Long Island</th>
<th>LIPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott Jennings</td>
<td>Tamela Monroe</td>
</tr>
<tr>
<td>Premal Patel</td>
<td>Donna Mongiardo</td>
</tr>
<tr>
<td>Peggy Keane</td>
<td>Billy Raley</td>
</tr>
<tr>
<td></td>
<td>Mujib Lodhi</td>
</tr>
</tbody>
</table>

Reporting to the Budget Steering Committee, a Joint PSEG Long Island and LIPA capital working group will be created to manage the implementation of this project plan including the process and data flow of the procedures outlined above.

**2.2. Other Stakeholders**

- PSEG Long Island Senior Leadership
- PSEG Long Island Business Units
- LIPA Senior Leadership
- LIPA Board of Trustees

**3. Project Plan**

**3.1. Project Work Plan**

The following outlines the timeline for completion of the key milestones.

<table>
<thead>
<tr>
<th>Task</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete and submit PJDs for required capital projects as described above to LIPA in advance of the annual budget process</td>
<td>Due annually on a rolling basis starting</td>
</tr>
</tbody>
</table>
Notify LIPA when URB documents are available that fall under the category of Preliminary PJDs

Notify LIPA when URB documents are available that fall under the category of New Projects or Changes in Project Scopes Between Capital Budgets

Improved PJD Template for 2023 Budget in SOS Tool

PSEG Long Island submits a request to Carryover Capital funds from the current Capital Budget to the Capital Budget under development, aligned with deferred scope.

The Budget Working Group will establish a policy to govern the inclusion of Risk and Contingency in a project’s cost estimate.

<table>
<thead>
<tr>
<th>Task</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify LIPA when URB documents are available that fall under the category of Preliminary PJDs</td>
<td>As Needed</td>
</tr>
<tr>
<td>Notify LIPA when URB documents are available that fall under the category of New Projects or Changes in Project Scopes Between Capital Budgets</td>
<td>As Needed</td>
</tr>
<tr>
<td>Improved PJD Template for 2023 Budget in SOS Tool</td>
<td>June 2022</td>
</tr>
<tr>
<td>PSEG Long Island submits a request to Carryover Capital funds from the current Capital Budget to the Capital Budget under development, aligned with deferred scope.</td>
<td>As Needed</td>
</tr>
<tr>
<td>The Budget Working Group will establish a policy to govern the inclusion of Risk and Contingency in a project’s cost estimate.</td>
<td>April 2022</td>
</tr>
</tbody>
</table>

3.2. Risk Management Plan

This section is not applicable.

3.3. Issue Resolution Plan

Issues will be raised and addressed during the Joint PSEG Long Island and LIPA Budget Steering Committee, as necessary.

3.4. LIPA Reporting Plan

PSEG Long Island will be working collaboratively with LIPA throughout the process. The Joint PSEG Long Island and LIPA Budget Steering Committee will be meeting continuously throughout the project cycle.

4. Technical Execution Plan

4.1. Technical Approach

The technical approaches required for this plan are discussed more fully above.

4.2. Quality Assurance Plan

The PJDs will be reviewed by each respective business area. They will then be submitted to Finance for submission to LIPA to ensure accurate information.

4.3. Documentation Plan

Throughout the project the implementation team will document and deliver the key
deliverables as listed above in Section 2. The due date of each deliverable will be based off the Project Schedule as outlined in Section 4.1.

<table>
<thead>
<tr>
<th>Document</th>
<th>Created By</th>
<th>Reviewed By</th>
<th>Target Date</th>
<th>Distribution</th>
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## Revision History

<table>
<thead>
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<th>Name</th>
<th>Date</th>
<th>Reason for Changes</th>
<th>Version</th>
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<tbody>
<tr>
<td>R. Tinelli</td>
<td>1/7/21</td>
<td>initial draft</td>
<td>1.0 draft 1</td>
</tr>
<tr>
<td>G. Ring</td>
<td>8/1/2021</td>
<td>Update process change and deliverable language</td>
<td>2.0 8/1/2021</td>
</tr>
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</table>