2018 Cross-Training Document

Reporting & Economic Analysis

May 2018

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1. Background

The R&EA team in Resource Planning is a five-member team, with support from a student.

The 5 main roles are divided into general subject matter areas as follows:

General Subject Matter	Incumbent
Reporting	Anna Lafoyiannis
Economic Analysis	Mike Risavy
Costs	Joyce Poon
Emissions	Brendan Callery
Operational Assessments	Vacant (Conrad Fox)

General Subject Matter	Incumbent	Secondary Contact
Reporting	Anna Lafoyiannis	Mike Risavy
Economic Analysis	Mike Risavy	Joyce Poon
Costs	Joyce Poon	Brendan Callery
Emissions	Brendan Callery	Anna Lafoyiannis
Operational Assessments	Vacant (Conrad Fox)	

To enhance cross-training within the group, all members of the group will receive training on selected tasks for each subject matter.

This document is intended to lay out a cross-training plan to enable the team to accomplish the following:

i. Document existing essential tasks associated with the current roles
ii. Assign a secondary contact on the 5 main subject matter areas to be cross-trained
iii. Enhance quality of deliverable with cross-trained staff to implement QA/QC

Further details on the cross-training plan are discussed in the following sections.

2. Documentation

Essential tasks for the 5 subject matter areas should be thoroughly documented by the incumbents in order to improve transparency, information retention, and to aid in cross-training,

Documentation will include the following:

- Clear document drafted by incumbent, detailing essential tasks from locations and/or source for raw data, to the final deliverable
- Consistent folder structure for each task, organized on the Aspen drive

The secondary contact will use the draft documentation as a guide throughout the cross-training, and edit the document as necessary.

3. Secondary Contacts and Cross-Training Subjects

Current cross-training plan for 2018 is as follows:

3.1 Reporting

Incumbent	Anna Lafoyiannis
Secondary Contact	Mike Risavy
Cross-training for Secondary Contact	18-month outlook
Cross-training for team	18-month outlook methodology

3.2 Economic Analysis

Incumbent	Mike Risavy
Secondary Contact	Joyce Poon
Cross-training for Secondary Contact	Economic Analysis for Regional Planning
Cross-training for team	Economic Analysis example (H9K)

3.3 Costs

Incumbent	Joyce Poon
Secondary Contact	Brendan Callery
Cross-training for Secondary Contact	Cost-to-Customer Model Update
Cross-training for team	Cost-to-Customer Model and Fair Hydro Plan Overview

3.4 Emissions

Incumbent	Brendan Callery
Secondary Contact	Anna Lafoyiannis
Cross-training for Secondary Contact	Ontario Energy Report Historical Emissions
Cross-training for team	Avoided Cost Analysis

3.5 Operational Assessments

Incumbent	Vacant (Conrad Fox)
Secondary Contact	TBD
Cross-training for Secondary Contact	TBD
Cross-training for team	TBD

4. Quality Assurance/Quality Control

The Reporting & Economic Analysis team will initially develop a customized approach to QA/QC that fits the needs of the group. The QA/QC approach will be an interative process, anticipated to be aligned with the broader Resource Planning group over time. Although the initial approach to QA/QC will remain flexible, the underlying guiding principles will be focused on the following:

a) **Process Documentation:** Thorough documentation of the process, with checks and discussion on the logic of decision points throughout the process
b) **Supporting Data:** provide relevant data that supports the outputs, for example a more granular breakdown of the final outputs by categorization
c) **Logic Check:** Check assumptions and decisions by reviewing the process, documentation, raw data, analysis, and outputs
d) **Source Check:** Confirm that the source of inputs are most appropriate and applicable, using the most current data and inputs
e) **Historical Check:** Include reference to historical outputs for comparison to the most recent outputs with explanation for any material deviations
f) **Parallel Check:** Where applicable, conduct parallel analysis using initial data and inputs to compare to the final output
g) **Visual Check:** Provide graphical representation of the data where it may show any anomalies or unexpected trends in the data as check on the validity of the data