

Phase 6 Playbook: Retirement & Decommissioning

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Owner: Project Management Office (PMO) / Enterprise Architecture

Applies To: All solutions entering retirement under MPG-002

Purpose & Scope

Phase 6 governs the orderly retirement, decommissioning, and archival of systems/processes that have reached end-of-life or are being replaced. The playbook ensures data retention, regulatory compliance, cost optimization, and knowledge capture while minimizing disruption to dependent services. This phase concludes the solution lifecycle defined in `Standards.md` and transitions responsibilities to portfolio/archive management.

A project enters Phase 6 when a retirement decision is approved by governance (Steering Committee, Portfolio Board, or Architecture Board). The phase ends once all decommission activities, data archiving, and contractual obligations are fulfilled.

Outcome Summary

Dimension	Target Outcome
Retirement Authorization	Formal approval with documented rationale, customer impact assessment, and funding for decommission activities.
Data & Compliance	Data retained, migrated, or destroyed in accordance with legal, regulatory, and corporate policies; audit evidence available.
Operational Transition	Dependent services updated; support teams notified; users guided to replacement processes or alternatives.
Technical Decommissioning	Infrastructure deprovisioned, integrations removed, monitoring disabled, and costs eliminated with no unintended downstream effects.
Knowledge Preservation	Lessons learned captured; documentation archived; metrics reported on cost savings, risk reduction, and benefits realized by retirement.

Phase 6 Timeline Overview

Most retirements run **6–12 weeks**, though legacy migrations may take longer. Stages:

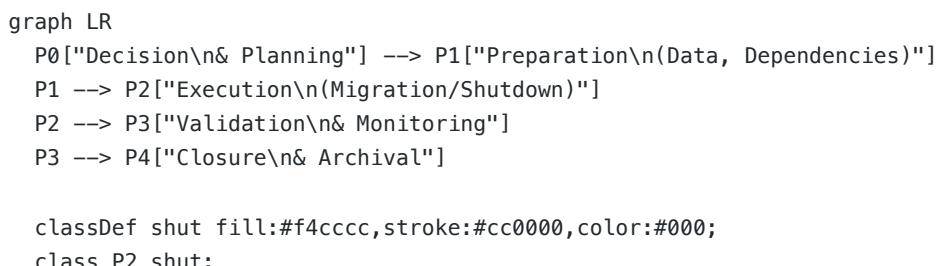


Figure 1. Typical retirement phases from decision through archival.

Detailed Workflow & Procedures

1. Retirement Initiation & Planning

Objective: Secure approvals and establish retirement plan.

Steps:

1. Prepare Retirement Business Case covering drivers (cost, risk, redundancy), stakeholders, replacement solution, and timeline.
2. Submit to Steering Committee/Portfolio Board for approval; capture decision in decision log.
3. Establish decommission team (PM, Product Owner, Technical Lead, Security, Legal, Finance, Operations).
4. Develop Retirement Plan detailing scope, dependencies, data disposition, communication strategy, budget.
5. Create risk register specific to retirement and align with organizational risk appetite.

Evidence Requirements: Approved retirement business case, governance minutes, retirement plan, retirement risk register.

2. Impact & Dependency Analysis

Objective: Identify systems, data flows, contracts, and users impacted.

Steps:

1. Review architecture diagrams, CMDB, integration catalogs to map dependencies (upstream/downstream, APIs, data feeds).
2. Engage stakeholders to validate usage (business processes, reports, integrations, partners).
3. Identify contractual obligations (vendor, customer SLAs) requiring notifications or amendments.
4. Document replacement solutions or alternative processes; create gap mitigation plan.
5. Update dependency register and include in communications/training plans.

Evidence Requirements: Dependency analysis report, stakeholder mapping, updated CMDB, contractual notification log.

3. Data Retention, Migration & Disposal Planning

Objective: Ensure data is handled per policy.

Steps:

1. Classify data (sensitive, personal, regulated) and map to retention/destruction policies.
2. Determine migration targets (data warehouse, replacement system) or archival storage.
3. Document data migration scripts, test plans, validation criteria, and disposal procedures.
4. Obtain approvals from Legal, Compliance, and Data Governance for retention/disposal approach.
5. Schedule migration/disposal activities with clear rollback contingencies.

Evidence Requirements: Data disposition plan, migration scripts/tests, approvals from Legal/Compliance, audit-ready logs.

4. Technical Decommissioning Execution

Objective: Shut down infrastructure and services safely.

Steps:

1. Create decommission checklist covering infrastructure (servers, VMs, containers), network (DNS, firewalls), storage, monitoring, backups.
2. Implement change tickets with CAB approval; coordinate windows to minimize business disruption.
3. Execute steps (disable access, stop services, remove integrations, deprovision resources, update documentation).
4. Validate success via monitoring (no traffic/errors), automated checks, or manual verification.
5. Release or repurpose assets; update cost center budgets.

Evidence Requirements: Decommission checklist, change tickets, execution logs, verification results, cost savings report.

5. Communications & Change Management

Objective: Keep users, partners, and support teams informed.

Steps:

1. Develop communications plan specifying audiences, messages, channels, cadence, and support contacts.
2. Provide retirement notices, instructions for alternative processes, and timelines.
3. Update training materials, FAQs, knowledge base entries to reflect replacement solutions.
4. Monitor feedback channels/hypercare to address concerns.
5. Confirm completion of communications with evidence (email delivery reports, intranet analytics).

Evidence Requirements: Communications plan, sample communications, knowledge updates, feedback log.

6. Security, Compliance & Legal Sign-off

Objective: Confirm security posture and regulatory requirements are met post-retirement.

Steps:

1. Perform final vulnerability scans (ensuring no residual exposure) before shutdown.
2. Remove system accounts, API keys, certificates; revoke access in IAM systems.
3. Capture evidence of data destruction or archival (certificates of destruction, storage references).
4. Update compliance matrix and audit logs; coordinate final reports to regulators if required.
5. Obtain formal sign-off from Security, Legal, and Compliance leads.

Evidence Requirements: Final scan reports, access revocation logs, destruction certificates, compliance sign-off forms.

7. Financial & Contractual Closure

Objective: Realize cost savings and terminate obligations.

Steps:

1. Identify contracts/licensing/subscriptions to terminate or downsize; coordinate with Procurement.
2. Update budgets, cost center allocations, and chargeback models with decommission savings.
3. Ensure invoices, penalties, or termination fees handled and documented.
4. Produce cost-benefit report summarizing savings vs. retirement investment.
5. Archive financial records in accordance with accounting retention policies.

Evidence Requirements: Contract termination confirmations, financial adjustments, savings report, procurement approvals.

8. Validation, Monitoring & Hypercare (Post-Retirement)

Objective: Confirm retired system remains inactive and no regressions occur.

Steps:

1. Monitor dependent systems to detect unexpected failures or data gaps.
2. Maintain short hypercare period (e.g., 2 weeks) with on-call contacts for fallback support.
3. Validate data archive accessibility and integrity tests.
4. Conduct user feedback surveys to ensure smooth transition.
5. Close hypercare when KPIs stable and no incidents occur for defined period.

Evidence Requirements: Monitoring reports, hypercare incident log, archive validation results, survey feedback.

9. Lessons Learned & Knowledge Archive

Objective: Preserve institutional knowledge for future retirements.

Steps:

1. Conduct post-retirement review capturing successes, issues, recommendations.
2. Update retirement playbooks/templates based on lessons learned.
3. Archive project documentation (charter, requirements, design, deployment, retirement) in records management system.
4. Tag archived artifacts with metadata (solution name, retirement date, data retention schedule).
5. Provide summary to PMO and Architecture for portfolio knowledge base.

Evidence Requirements: Lessons learned report, updated templates, archive inventory list, PMO acknowledgement.

10. Closure & Portfolio Update

Objective: Finalize lifecycle records and update enterprise dashboards.

Steps:

1. Update portfolio inventory marking system status as Retired (with effective date).
2. Remove retired system from operational dashboards, monitoring, and support runbooks.
3. Submit closure report including KPIs, financial outcomes, and compliance evidence to Steering Committee.
4. Notify Finance, Security, and PMO that retirement activities are complete.
5. Transition ownership of archived assets to Records Management or Knowledge Management teams.

Evidence Requirements: Portfolio update confirmation, closure report, final approvals, archival hand-off documentation.

Deliverable Specifications

Deliverable	Purpose	Required Contents	Format
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Retirement Plan & Business Case	Formalize decision and roadmap.	Drivers, scope, dependencies, timeline, budget, risk analysis, approval signatures.	.pptx/.pdf. Naming: ProjectName_Retirement
Dependency & Impact Assessment	Document system/process impacts.	Data flows, integrations, stakeholders, replacements, mitigation actions.	.xlsx/.pdf. Naming: ProjectName_Dependency
Data Disposition Plan	Define migration/archival/destruction approach.	Data inventory, retention requirements, migration targets, destruction methods, approvals.	.docx. Naming: ProjectName_DataDispos
Decommission Checklist & Execution Logs	Track technical shutdown tasks.	Checklist items, owners, timestamps, verification evidence.	.xlsx. Naming: ProjectName_DecomCheck
Communications & Training Packet	Inform stakeholders and guide transitions.	Communication plan, FAQs, training materials, notification records.	.pdf/.zip. Naming: ProjectName_Retirement
Security/Compliance Closure Pack	Provide audit evidence.	Access revocation logs, destruction certificates, compliance matrix updates, sign-offs.	.pdf. Naming: ProjectName_Compliance
Financial Closure Report	Document cost savings and contract terminations.	Contract status, cost changes, savings vs. plan, financial approvals.	.pdf. Naming: ProjectName_FinancialC

Retirement Closure & Lessons Learned Report	Capture final outcomes and knowledge.	Summary of activities, KPIs, issues, lessons, recommendations, next steps.	.pptx/.pdf. Naming: ProjectName_Retirement
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Document Control Notes:

- Store Phase 6 artifacts under /docs/phase-6/ with subfolders (planning/ , data/ , decommission/ , communications/ , compliance/ , closure/).
- Approvals and evidence go in /docs/approvals/phase-6/ linked via README.
- After closure, archive documentation per records retention policy (typically 7–10 years, depending on regulation).

Artifact Completion Tracker

Artifact	Owner	Status (Draft / In Review / Approved)	Repository Path	Version	Approval Evidence Stored?	Planned Completion
Retirement Plan & Business Case						
Dependency Assessment						
Data Disposition Plan						
Decommission Checklist/Logs						
Communications Packet						
Compliance Closure Pack						
Financial Closure Report						
Retirement Closure Report						

Update tracker at each governance checkpoint (plan approval, execution start, closure).

Approval Evidence Requirements

- **Decision Log Entries:** Retirement approvals, change freezes, risk acceptances.
- **Signed Certificates:** Data destruction, contract termination confirmations.
- **Change Tickets:** Completed decommission change tickets with CAB approval.
- **Audit Trail:** Timestamped logs for data migration, system shutdown, access removal.

Decommissioning Checklist by Workstream

Workstream	Activity	Evidence Location	Responsible Role	Status
Planning	Retirement plan approved; budget secured.	/docs/phase-6/planning/	PM	
Dependencies	Impact analysis validated by stakeholders.	/docs/phase-6/planning/	Technical Lead	
Data	Migration/disposition executed; validation complete.	/docs/phase-6/data/	Data Governance Lead	
Technical	Infrastructure decommissioned; integrations removed.	/docs/phase-6/decommission/	DevOps Lead	
Communications	Notifications delivered; knowledge base updated.	/docs/phase-6/communications/	Change Mgmt Lead	
Compliance	Security checks complete; legal sign-off obtained.	/docs/phase-6/compliance/	Security & Legal Leads	
Finance	Contracts closed; savings report approved.	/docs/phase-6/finance/	Finance Partner	
Closure	Lessons learned captured; portfolio updated.	/docs/phase-6/closure/	PMO	

Roles, Responsibilities & RACI (Phase 6 Focus)

Activity	Executive Sponsor	Steering Committee / Portfolio Board	Project Manager	Product Owner	Technical Lead	Data Governance Lead
Approve retirement plan	A	R	R	C	C	C
Conduct dependency analysis	C	C	R	C	R	C
Execute data disposition	I	I	C	C	C	R/A
Perform technical decommission	I	I	C	C	R	I
Manage communications	A	C	R	R	C	C

Security/compliance sign-off	A	C	R	C	C	C
Financial closure	A	C	R	C	C	I
Lessons learned & closure	A	R	R	R	C	C

Key: R = Responsible, A = Accountable, C = Consulted, I = Informed.

Meeting & Collaboration Cadence (Phase 6)

Meeting	Purpose	Participants	Frequency	Inputs	Output
Retirement Kick-off	Align stakeholders on plan and roles.	Sponsor, PM, Product Owner, Technical Lead, Data, Security, Legal, Finance	Once at initiation	Retirement plan draft	Action items confirmed timeline
Dependency Review Workshop	Validate integration and process impacts.	Technical, Product, Operations, Architects	Once (early)	Dependency matrix	Updated dependency
Decommission Change Review (CAB)	Approve infrastructure changes/shutdown.	CAB members, PM, DevOps, Security	Weekly during execution	Change tickets, risk assessments	Approved/rejected changes
Data Migration Validation	Confirm migration/disposal results.	Data Governance, QA, Security	As needed	Migration reports, validation scripts	Sign-offs, deployment list
Communications Checkpoint	Review messaging, user readiness.	Change Mgmt, Product Owner, PM, Operations	Biweekly	Comms plan, feedback log	Updates to next actions
Compliance & Audit Review	Ensure regulatory requirements met.	Security, Legal, Compliance, PM	Biweekly	Compliance matrix, evidence	Sign-offs, remediation actions
Closure Review	Present results, lessons, final	Sponsor, Steering	Once (end)	Closure report,	Closure decision archive

	approvals.	Committee, PMO, Teams		evidence pack	instructions
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Risk & Control Considerations

Common Phase 6 Risks

1. **Hidden Dependencies:** Unidentified integrations causing failures. Mitigate with thorough discovery and stakeholder validation.
2. **Data Loss/Unauthorized Exposure:** Mishandled data disposal. Enforce approved methods, logging, and dual controls.
3. **Regulatory Non-Compliance:** Failure to retain/destroy data as required. Engage Legal/Data Governance early.
4. **Cost Overruns:** Unexpected migration or decommission costs. Budget with contingency, track expenditures closely.
5. **User Disruption:** Inadequate communication leading to business process gaps. Plan communications/training early and monitor feedback.
6. **Security Gaps Post-Shutdown:** Residual accounts or configs left active. Execute access revocation checklists and re-scan environment.

Control Activities

- Dual authorization for data destruction and system shutdown steps.
- CAB approvals for all decommission changes.
- Compliance sign-offs before final closure (Legal, Security, Finance).
- Post-implementation review to capture lessons and confirm success metrics.
- PMO audit of documentation, evidence, and approvals before archiving.

Tooling & Configuration Requirements

Tool / Platform	Configuration Action	Owner	Evidence
CMDB / Service Catalog	Update status to "Retired", remove active dependencies.	Service Management Office	CMDB export, change log.
ITSM Tool	Track retirement change tickets, incidents, communications tasks.	PM / Change Manager	Ticket reports, CAB approvals.
Data Migration Tooling (ETL, SQL scripts)	Execute migration/disposal with logging and validation.	Data Governance Lead	Migration logs, validation reports.
Security Tools (SIEM, IAM)	Remove accounts, disable monitoring alerts, confirm zero traffic.	Security Lead	Access logs, SIEM reports.
Financial Systems	Update budgets, cost centers, depreciation schedules.	Finance Partner	Financial adjustment reports.

Knowledge Repositories (SharePoint, Confluence)	Archive documentation, tag with retention metadata.	PM / PMO	Archive index, retention confirmation.
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Checklists & Reviews

A. Retirement Plan Approval Checklist

- Business case approved; replacement solution identified.
- Budget/funding secured; resource plan in place.
- Risk register created with owners.
- Dependency analysis completed and validated.
- Communications strategy drafted.
- Legal, Security, Data Governance consulted.

B. Data Disposition Checklist

- Data inventory validated; classification confirmed.
- Migration scripts tested and signed off.
- Archival storage reviewed and approved.
- Destruction schedule documented with responsible parties.
- Legal/Compliance approval recorded.
- Post-migration validation executed; results archived.

C. Technical Decommission Checklist

- Change tickets submitted and CAB-approved.
- Access revoked for users, service accounts, and integrations.
- Infrastructure components shut down and removed.
- Monitoring/alerts disabled or reconfigured.
- Backup/DR procedures updated or retired.
- Verification results documented (no residual traffic/errors).

D. Closure Checklist

- Hypercare period completed without incidents.
- All documentation archived with retention tags.
- Financial savings report delivered and approved.
- Security/compliance sign-offs stored with evidence.
- Portfolio inventory updated to "Retired" status.
- Lessons learned session held; actions assigned.

Templates & Samples

Appendix A: Retirement Plan Outline

1. Executive Summary (rationale, objectives, timeline).
2. Stakeholder & Dependency Overview.

3. Data Disposition Strategy.
4. Technical Decommission Approach.
5. Communications & Change Management.
6. Risk & Mitigation Plan.
7. Budget & Resource Plan.
8. Approval Signatures.

Appendix B: Decommission Checklist (Excerpt)

Step	Description	Owner	Status	Timestamp
Disable user access	Remove user roles and API keys.	IAM Admin		
Shut down application servers	Power off VMs/containers, remove auto-scaling groups.	DevOps Lead		
Remove DNS entries	Delete DNS records, update load balancers.	Network Engineer		
Stop data feeds	Terminate ETL jobs, API integrations.	Data Engineer		
Update monitoring	Disable dashboards/alerts, confirm zero traffic.	Observability Engineer		
Archive documentation	Move docs to records repository with tags.	PM		

Appendix C: Data Disposition Log Fields

Field	Description
Dataset ID	Unique identifier for dataset.
Classification	Sensitivity level (Public, Internal, Confidential, Regulated).
Disposition Type	Migration, Archival, Destruction.
Target Location	Destination system or storage.
Approval Reference	Legal/Compliance approval ID.
Execution Date	Date disposition completed.
Verification Result	Pass/Fail with notes.

Appendix D: Communications Matrix

Audience	Message	Channel	Timing	Owner	Status
All Users	Retirement announcement & timeline.	Email/Intranet	T-60 days	PMO Comms	Scheduled

Key Stakeholders	Alternative process instructions.	Workshops/Meetings	T-45 days	Product Owner	Scheduled
Support Teams	Support process changes, runbook updates.	Training session	T-30 days	Support Manager	In Progress
Executives	Benefits & savings update.	Executive briefing	T-10 days	PM	Planned

Appendix E: Retirement Closure Report Outline

1. Background & Objectives.
2. Activities Completed (data, technical, communications).
3. Metrics (cost savings, risk reduction, incidents).
4. Compliance & Audit Evidence summary.
5. Lessons Learned & Recommendations.
6. Final Approvals.

Appendix F: Artifact Status Table (Embed in README)

Artifact	Owner	Location	Version	Approval Status
Retirement Plan	PM	/docs/phase-6/planning/retirement_plan_v20251110.pdf	v20251110	Approved
Data Disposition Plan	Data Governance Lead	/docs/phase-6/data/disposition_plan_v20251115.docx	v20251115	Approved
Decommission Checklist	DevOps Lead	/docs/phase-6/decommission/decom_checklist.xlsx	v20251120	In Progress
Compliance Closure Pack	Security Lead	/docs/phase-6/compliance/closure_pack_v20251201.pdf	v20251201	Draft
Financial Closure Report	Finance Partner	/docs/phase-6/finance/closure_report_v20251205.pdf	v20251205	Approved
Lessons Learned Report	PM	/docs/phase-6/closure/lessons_v20251210.pdf	v20251210	Draft

Appendix G: Data Destruction Certificate Template

Field	Description
Certificate ID	DDC-YYYY-###.
System / Dataset	Name of system, table, or dataset destroyed.

Data Classification	Public / Internal / Confidential / Regulated.
Destruction Method	e.g., NIST 800-88 wipe, cryptographic erasure, shredding.
Location	Physical or cloud location where destruction occurred.
Date & Time	Timestamp (UTC).
Authorized By	Legal/Compliance approver.
Performed By	Technician/operator executing destruction.
Verification	Validation method (hash comparison, audit log).
Witnesses	Optional witness names/roles.
Comments	Notes, ticket numbers, evidence references.

Store completed certificates in `/docs/phase-6/compliance/data_destruction/` and reference them in the compliance closure pack.

Compliance & Naming Expectations

- **SOC/SOC 2 Coverage:** Link retirement controls (change approvals, access revocations, destruction certificates) to SOC/SOC 2, ISO 27001, or other regulatory frameworks. Maintain a control matrix in `/docs/phase-6/compliance/` that references evidence files for audit readiness.
- **Consistent Naming:** All retirement artifacts, scripts, and archive manifests must follow the naming pattern `ProjectIdentifier_Artifact_vYYYYMMDD.ext`. Apply the same conventions to raw logs (e.g., `ProjectIdentifier_DecomLog_20251201.csv`) to ease traceability.
- **Immutable Audit Trail:** Store key retirement logs (data migration outputs, shutdown timestamps, access removal reports) in append-only or write-once storage when policy requires tamper resistance.
- **Verification Records:** Capture post-shutdown monitoring snapshots and audit confirmations immediately after execution and archive with control IDs.

Glossary of Phase 6 Terms

- **Decommission:** Process of safely shutting down and removing systems/infrastructure.
- **Data Disposition:** Migration, archival, or destruction of data per policy.
- **Retirement Plan:** Document detailing scope and approach for decommissioning.
- **Hypercare (Retirement):** Short period after shutdown to monitor stability and support stakeholders.
- **Certificate of Destruction:** Documentation proving data/system deletion.
- **Portfolio Inventory:** Central record of active/retired solutions.
- **Records Management:** Corporate function managing archival of documentation and data per retention rules.

Acronyms and Abbreviations

- **ADR:** Architecture Decision Record - Document capturing design choices and rationale
- **API:** Application Programming Interface - Set of protocols for building software applications
- **BA:** Business Analyst - Role responsible for requirements gathering and analysis
- **CAB:** Change Advisory Board - Governance body approving significant changes
- **CCB:** Change Control Board - Group responsible for approving/rejecting change requests

- **CI/CD:** Continuous Integration/Continuous Delivery - Automated pipeline for build, test, and deployment
- **CISO:** Chief Information Security Officer - Executive responsible for information security
- **CM-410:** Change Management Framework document identifier
- **CMDB:** Configuration Management Database - Repository of IT assets and their relationships
- **DATA-015:** Data Retention & Destruction Policy document identifier
- **DNS:** Domain Name System - System translating domain names to IP addresses
- **DR:** Disaster Recovery - Process for restoring IT systems after a disaster
- **ETL:** Extract, Transform, Load - Process for moving data between systems
- **GDPR:** General Data Protection Regulation - European Union data protection and privacy regulation
- **HIPAA:** Health Insurance Portability and Accountability Act - U.S. healthcare data protection regulation
- **IAM:** Identity and Access Management - Framework for managing user identities and access
- **ISO 27001:** International standard for information security management systems
- **ITSM:** IT Service Management - Framework for managing IT services
- **KPI:** Key Performance Indicator - Measurable value demonstrating effectiveness
- **MPG-002:** Master Project Governance standard document identifier
- **NIST 800-88:** NIST Special Publication 800-88 - Guidelines for media sanitization
- **NIST CSF:** National Institute of Standards and Technology Cybersecurity Framework - U.S. cybersecurity framework
- **OWASP:** Open Web Application Security Project - Non-profit organization focused on web application security
- **PCI DSS:** Payment Card Industry Data Security Standard - Security standard for payment card data
- **PIG-200:** Portfolio & Investment Governance Guidelines document identifier
- **PM:** Project Manager - Role responsible for project coordination and delivery
- **PMO:** Project Management Office - Organizational unit ensuring adherence to standards and methodologies
- **QA:** Quality Assurance - Process ensuring products meet quality standards
- **RCA:** Root Cause Analysis - Process for identifying underlying causes of problems
- **RM-100:** Records Management & Archival Policy document identifier
- **RPO:** Recovery Point Objective - Maximum acceptable data loss measured in time
- **RTO:** Recovery Time Objective - Maximum acceptable downtime after a disaster
- **SAST/DAST:** Static Application Security Testing / Dynamic Application Security Testing - Security testing methodologies
- **SDLC:** Software Development Life Cycle - Process for planning, creating, testing, and deploying software
- **SEC-045:** Security Decommissioning Checklist document identifier
- **SIEM:** Security Information and Event Management - Technology for security monitoring
- **SLA:** Service Level Agreement - Contractual commitment to service performance levels
- **SLO:** Service Level Objective - Target metric for service performance
- **SOC/SOC 2:** System and Organization Controls - Framework for security, availability, and confidentiality controls
- **SOX 404:** Sarbanes-Oxley Act Section 404 - U.S. financial reporting and internal controls regulation
- **VM:** Virtual Machine - Software emulation of a physical computer
- **WCAG 2.1:** Web Content Accessibility Guidelines 2.1 - International standard for web accessibility

References

1. MPG-002 Standard ([Standards.md](#)) – Master Project Governance & SDLC.

2. Data Retention & Destruction Policy (DATA-015).
 3. Change Management Framework (CM-410).
 4. Security Decommissioning Checklist (SEC-045).
 5. Records Management & Archival Policy (RM-100).
 6. Portfolio & Investment Governance Guidelines (PIG-200).
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Document History

Version	Date	Author	Reviewer	Approver	Notes
1.0	2025-11-07	PMO Documentation Lead	PMO Director	Executive Sponsor	Initial release for Phase 6 guidance.