

# AI-ABILITY FOR PROJECT MANAGEMENT

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Integrated Companion Toolkit — First Edition, Version 1.0, 2026

Editable Tools for Applying **AI-ABILITY** in Project Management

**A** **ALIGN** AI with project goals

**B** **BREAK** down scope, milestones and tasks

**I** **INSTRUCT** AI with appropriate context

**L** **LOOK** critically at outputs

**I** **INTEGRATE** verified insights into decisions

**T** **TRACK** progress, risks and results

**Y** **YOU** decide and remain accountable

Mohamed Tache Dida

## How to use this toolkit

This toolkit contains the editable work products referenced in AI-Ability for Project Management. Use each tool after reading its completed Rivergate example in the main book. Tailor depth and controls to the project, consequence, evidence, law, contract and organisational policy. The toolkit supports professional judgement; it does not replace it.

This edition contains editable worksheets, reusable reference structures, completed Rivergate examples and Context Briefs. Guidance prompts explain what belongs in each field; blank entry cells are for typing or handwriting. Word tables may expand during digital completion, while the PDF preserves the fixed print and reference layout.

1. Read the corresponding chapter and completed Rivergate example in the main book.
2. Select only the fields proportionate to the decision and consequence.
3. Complete the tool with authorised evidence and named human owners.
4. Verify before integration, record the decision, and track the consequence.

## Control chain at a glance

This is the operating sequence already used by the book and toolkit. Each control has a different job; none replaces the next.

| Stage                                      | Purpose and when used                                                                                                   | Responsible owner                                                | Required record or output                                     | Hand-off                                                                     |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------------------|------------------------------------------------------------------------------|
| <b>T2 — Responsible AI Working Charter</b> | Sets the continuing permission, tool, information, review and escalation boundary before a use is authorised.           | Project manager with information, governance and decision owners | Approved, versioned charter and exceptions                    | Provides the standing controls for T2A.                                      |
| <b>T2A — AI Work Brief</b>                 | Defines one responsibility, decision, source set, constraints and required result before each assignment.               | Work owner                                                       | Completed AI Work Brief with verifier and authority           | Bounds the instruction and AI contribution.                                  |
| <b>Bounded AI output</b>                   | Produces provisional analysis, comparison, classification or drafting inside the brief.                                 | AI operator; work owner remains accountable                      | Retained output/version and source context                    | Moves to the Verification Gate; never directly to decision use.              |
| <b>Verification Gate</b>                   | Tests sources, facts, calculations, omissions, assumptions, uncertainty, feasibility and boundaries before integration. | Named domain and evidence reviewers                              | Correction record and verified or rejected material           | Verified material enters an owned management work product.                   |
| <b>Human Decision Record</b>               | Preserves the authorised choice, evidence, uncertainty, rationale, conditions, owner and follow-up.                     | Designated decision authority                                    | Decision record and authorised action                         | Sends the decision and expected consequence to tracking.                     |
| <b>T15 — tracking and review</b>           | Measures the full workflow and its result during each cycle and after incidents or material change.                     | Workflow owner with work and decision owners                     | Performance, correction, incident, fallback and review record | Continue, improve, restrict, roll back or retire; update T2/T2A when needed. |

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# T1 — Personal AI Opportunity Map — editable one-page version

Main-book chapter: Chapter 1 — From Prompts to Project Performance

Editable worksheet

## A reusable one-page version

Use the following compact form for your own project.

| Field                      | Guidance prompt                                                                                      | Your entry |
|----------------------------|------------------------------------------------------------------------------------------------------|------------|
| Responsibility             | What must you achieve, protect or decide?                                                            |            |
| Decision or result         | Who will use the work, and what observable consequence should improve?                               |            |
| Bounded AI contribution    | What may AI structure, compare, challenge, calculate, analyse or draft?                              |            |
| Evidence and readiness     | What approved sources, definitions and baselines exist? What is missing?                             |            |
| Review and authority       | Who can verify the work, who can approve its use and who may act?                                    |            |
| Information boundary       | What is permitted, anonymised, approval-required or prohibited?                                      |            |
| Six ratings                | Value ___ / Effort ___ / Evidence readiness ___ / Reviewability ___ / Consequence ___ / Exposure ___ |            |
| Placement                  | Pilot now / Prepare first / Assist cautiously / Keep outside AI                                      |            |
| Trial and measure          | Baseline, trial period, success measures, owner and review date                                      |            |
| Stop or escalation trigger | What error, uncertainty, harm or boundary concern requires pause or escalation?                      |            |

Complete the form for five to eight responsibilities across PLAN, TRACK and DELIVER. Do not select the highest score automatically. Choose one responsibility that matters, can be reviewed and fits the authorised information boundary. Record at least one valuable future use that requires preparation and at least one use that should remain outside AI.

## T2 — Responsible AI Working Charter — editable version and review questions

*Main-book chapter: Chapter 2 — Working Responsibly with ABILITY*

Editable worksheet

### Use the charter on your own project

Complete this compact version for one responsibility from your Personal AI Opportunity Map. If you cannot name the authorised tool, information boundary, reviewer or escalation route, the use is not ready.

| Field                              | Guidance prompt                                                                        | Your entry |
|------------------------------------|----------------------------------------------------------------------------------------|------------|
| <b>Responsibility and decision</b> | What duty is being supported, and what decision must improve?                          |            |
| <b>Intended result and user</b>    | What change matters, and who will use the work?                                        |            |
| <b>Permitted AI contribution</b>   | What may AI structure, compare, calculate, challenge or draft?                         |            |
| <b>Human-only work</b>             | What judgement, consultation or approval cannot be delegated?                          |            |
| <b>Approved tool and access</b>    | Which environment and account are authorised, for whom and for this purpose?           |            |
| <b>Information boundary</b>        | What is permitted, redacted or aggregated, approval-required and prohibited?           |            |
| <b>Instruction standard</b>        | Which sources, dates, definitions, constraints and output criteria are mandatory?      |            |
| <b>Verification gates</b>          | Who checks facts, sources, calculations, omissions, bias, uncertainty and feasibility? |            |
| <b>Integration and authority</b>   | Who may accept a finding, change a record, assign action or approve a decision?        |            |
| <b>Record and disclosure</b>       | What inputs, outputs, changes, reviewers and disclosures must be retained?             |            |
| <b>Incident and escalation</b>     | Which events stop use, who is notified and who authorises resumption?                  |            |
| <b>Tracking and review</b>         | Which value, effort, quality and risk measures will be reviewed, and when?             |            |

Use the charter as a living control. Update it when the responsibility, tool, information, people, consequence or organisational requirements change. A charter copied unchanged across projects is likely to be as weak as a generic prompt.

Before the first use, read the completed charter aloud with the people who must follow it. Ask each person to explain, in their own words, what they may use, what they must verify, what they cannot decide and what would make them stop. Ambiguity found in that conversation is cheaper to correct than ambiguity discovered after a disclosure or contested decision.

After use, do not ask only whether the output was “good”. Compare the promised contribution with the evidence:

- Did the system find a material gap that reviewers confirmed?
- Which flags were unsupported, duplicated or too vague to act on?
- Did preparation and review save time overall?
- Did the work improve a decision, reduce rework or surface a risk earlier?
- Did any person, source or perspective become less visible?
- Did the team stay inside the approved information and authority boundary?

These questions turn the charter from a permission form into a learning mechanism. A successful pilot may justify careful expansion. A mixed result may require narrower tasks or better context. A boundary incident, repeated untraceable claims or review effort greater than the benefit may justify stopping. All three outcomes are useful if the decision is recorded honestly.

## T2A — AI Work Brief — reusable assignment template

*Main-book chapters: Chapters 2–15*

Editable worksheet

### Use this brief for one AI-assisted assignment

Complete T2A after the Responsible AI Working Charter and before a consequential AI-assisted task. The Charter sets continuing permission, tool, information, review and escalation boundaries; this brief applies those controls to one responsibility, decision or management work product.

A prompt is wording sent to a system. The AI Work Brief is the controlled assignment around that wording: sources, cut-off, definitions, constraints, prohibited inference, required output, human review, authority, records and consequence. The brief should remain usable when the prompt or tool changes.

The system response remains a provisional AI output. It becomes a management work product only after the Verification Gate has checked source fidelity, calculations, omissions, assumptions, uncertainty and feasibility, and the named human owner has integrated the verified material. Decision authority remains human.

**Execution instruction: use only the approved sources and definitions. Do not invent evidence, complete missing fields by inference or conceal conflict. State what is verified, provisional, assumed, unresolved, contradicted or not established; stop and identify missing information when the required standard cannot be met.**

| Brief field                              | Your working entry | Control question                                         |
|------------------------------------------|--------------------|----------------------------------------------------------|
| Project responsibility                   |                    | What duty is being performed, and who owns it?           |
| Decision, action or work product         |                    | What must improve, be produced or be decided?            |
| Intended user and consequence            |                    | Who will use the work, and what may follow?              |
| Approved sources and evidence cut-off    |                    | Which versions, dates and repositories govern?           |
| Definitions, constraints and assumptions |                    | Which terms, boundaries and planning propositions apply? |

| Brief field                               | Your working entry | Control question                                                                                                                                              |
|-------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Permitted AI contribution                 |                    | What may AI structure, compare, calculate, challenge or draft?                                                                                                |
| Prohibited inference or decision          |                    | What must AI not infer, decide, approve or repair?                                                                                                            |
| Required output structure                 |                    | Which fields, comparisons, evidence links and labels are mandatory?                                                                                           |
| Uncertainty and missing-information rules |                    | Use verified, provisional, assumption, unresolved, contradictory evidence and not established as appropriate; never fill a gap merely to complete the format. |
| Verification criteria                     |                    | Which facts, sources, calculations, omissions, bias and feasibility checks must pass?                                                                         |
| Domain reviewer                           |                    | Who is competent and authorised to verify the substance?                                                                                                      |
| Decision or approval authority            |                    | Who may accept the work or authorise action?                                                                                                                  |
| Required records                          |                    | Which sources, prompt/instructions, output, corrections, reviewers and decisions must be retained?                                                            |
| Action, tracking or consequence review    |                    | What owner, date, measure and trigger will show what happened next?                                                                                           |

## T3 — Decision-Ready Business Case — reusable structure and practical sequence

*Main-book chapter: Chapter 3 — Project Definition and Business Cases*

Reference structure

### Reusable challenged, decision-ready business case

Tailor the depth to the scale, uncertainty and irreversibility of the investment. Expand supporting schedules where necessary, but keep this decision-critical summary intact.

| Decision-critical field | Required entry                                                                                                  | Challenge and control                                                                     |
|-------------------------|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| Decision and authority  | Exact decision requested; decision-maker; delegated authority; amount, phase and deadline                       | Distinguish prior approvals; state prohibited commitments and next gate                   |
| Problem and baseline    | Affected group or system; condition, scale, consequence and likely contributors; measures, boundaries and dates | Do not embed the solution; label fact, estimate and assumption; cite owner and limitation |

| Decision-critical field                  | Required entry                                                                                                    | Challenge and control                                                                 |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Intended result</b>                   | Beneficiary, expected change, timeframe and success evidence                                                      | Separate outputs, outcomes and benefits; expose causal assumptions and harms to avoid |
| <b>Strategic and stakeholder need</b>    | Current objective advanced; material stakeholder needs, burdens and missing voices                                | Test competing priorities, distribution and the consequence of doing nothing          |
| <b>Options</b>                           | Current state, minimum response and credible alternatives on a common basis                                       | Explain screened-out options; preserve a real choice                                  |
| <b>Benefits, costs and constraints</b>   | Benefit owners and measures; whole-life cost basis; funding, capacity and operating constraints                   | Avoid double counting; record exclusions, price basis, reserve and uncertainty        |
| <b>Risk, assumptions and sensitivity</b> | Critical uncertainties, contrary evidence, scenarios, thresholds and early warnings                               | State what would change the preferred option or require escalation                    |
| <b>Feasibility</b>                       | Technical, operational, schedule, commercial, financial, organisational, safeguard, stakeholder and data findings | Convert material gaps into conditions, actions or reasons to defer                    |
| <b>Decision and conditions</b>           | Invest, revise, defer or reject; rationale, trade-offs, conditions, tolerances, date and authority                | Record what is not authorised and the trigger for reconsideration                     |

## A practical sequence for developing the case

When the pressure to “get the paper approved” is high, use this sequence:

1. Define the exact investment decision, authority and consequence.
2. Establish the problem, affected stakeholders and controlled baseline.
3. Define the intended result and causal assumptions.
4. Develop realistic options before selecting a preference.
5. Analyse benefits, whole-life costs, constraints, risks, distribution, sensitivity and feasibility.
6. Use AI to structure and challenge—not to invent evidence or pre-decide.
7. Conduct independent review, record dissent, decide and impose conditions.
8. Transfer the approved logic into scope, plans, risks and results controls.

The sequence is not a competing framework. It is a practical application of PLAN–TRACK–DELIVER and ABILITY to one project-management responsibility.

## T4 — Scope and Requirements Baseline — reusable tool and practical sequence

*Main-book chapter: Chapter 4 — Scope, Requirements and Acceptance Criteria*

### Reference structure

### Reusable scope-baseline tool

Use this compact structure for a live project. Expand only where consequence and complexity require it.

| Decision-critical field       | Required entry                                                        | Challenge and control                                                       |
|-------------------------------|-----------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <b>Result and boundary</b>    | Intended result; included outputs and work; exclusions; interfaces    | Identify silent expansion, erosion and dependencies outside project control |
| <b>Users and requirements</b> | Stable ID; need/source; clear obligation; priority; owner             | Check missing users, ambiguity, feasibility, bias and hidden design choices |
| <b>Acceptance</b>             | Criterion; method; evidence; acceptor; timing                         | Separate completion, conformity, usefulness and decision authority          |
| <b>Traceability</b>           | Need → requirement → deliverable/work → evidence                      | Keep links proportionate; expose orphans and change effects                 |
| <b>AI and verification</b>    | Approved inputs; AI contribution; weakness; review and correction     | Retain sources and versions; do not accept generated authority              |
| <b>Decision and change</b>    | Baseline/version; approval; tolerances; change trigger and owner      | Record consequence before editing the controlled promise                    |
| <b>Handoff and result</b>     | Inputs to schedule, contract, quality, transition and benefits review | Track whether accepted outputs enable the intended result                   |

### A practical sequence for controlling scope

1. Restate the approved result, decision conditions and authority.
2. Define inclusions, exclusions, interfaces, constraints and assumptions.
3. Elicit needs from sponsors, users, operators, maintainers and affected people.
4. Write, classify, prioritise and own requirements.
5. Define acceptance criteria, evidence and authority while options remain open.
6. Trace critical requirements to deliverables, work, contracts and tests.
7. Use AI to structure and challenge coverage within the approved information boundary.
8. Verify with functional owners, correct the baseline and record approval.
9. Control change and hand the accepted baseline to scheduling, procurement, quality and transition.

## T5 — Schedule Challenge — reusable tool and practical sequence

*Main-book chapter: Chapter 5 — Work Breakdown, Dependencies and Scheduling*

Reference structure

### Use when needed: schedule challenge

| Decision-critical field      | Required entry                                                           | Challenge and control                                            |
|------------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>Scope and endpoint</b>    | Approved deliverables, acceptance states, planning horizon and authority | Expose omitted transition, assurance and acceptance work         |
| <b>WBS and ownership</b>     | Work package, completion boundary, owner and scope link                  | Test completeness, overlap and level of control                  |
| <b>Activities and logic</b>  | Action, predecessor/successor, completion condition and interface        | Separate causal dependencies from habits or preferences          |
| <b>Estimate basis</b>        | Duration/range, calendar, quantity, productivity and source              | Flag unsupported precision and start-condition errors            |
| <b>Milestones and path</b>   | Evidenced state, authority, date, critical/near-critical path            | Treat milestones as decisions; recheck path after change         |
| <b>AI and verification</b>   | Approved inputs, provisional analysis, weakness and correction           | Retain source and version; restrict commercial or sensitive data |
| <b>Decision and tracking</b> | Baseline, tolerance, owner, forecast, trigger and handoff                | Preserve baseline evidence and record authorised replan          |

### A practical sequence for building a credible schedule

1. Confirm the approved scope, acceptance events, constraints and planning authority.
2. Build a deliverable-oriented WBS with owned completion boundaries.
3. Define the activities needed to complete each work package.
4. Identify technical, external, resource, governance and evidence dependencies.
5. Estimate durations from stated sources, calendars and uncertainty ranges.
6. Build the network and identify critical and near-critical paths.
7. Integrate resources, risk, procurement, access, approvals and contingency.
8. Use AI to test completeness and logic within the approved information boundary.
9. Challenge with functional owners; correct, approve and baseline the schedule.
10. Track actuals and forecasts, preserve the baseline and control any replan.

## T6 — Integrated Cost–Resource Plan — reusable tool and practical sequence

*Main-book chapter: Chapter 6 — Cost, Resources and Procurement*

Reference structure

### Reusable cost–resource planning tool

| Decision-critical field      | Required entry                                                                           | Challenge and control                                         |
|------------------------------|------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| <b>Purpose and boundary</b>  | Decision, envelope, scope version, schedule version and authority                        | Separate budget, estimate, funding and approval               |
| <b>Estimate basis</b>        | WBS item, quantity or effort, rate, date, source, method and range                       | Reconcile scope and price bases; test false precision         |
| <b>Resource plan</b>         | Capability, capacity, period, owner, supply, gap and mobilisation                        | Confirm with resource owners; expose peaks and conflicts      |
| <b>Procurement</b>           | Make-or-buy decision, packaging, market, lead time, value criteria and contract controls | Protect integrity, interfaces, acceptance and lifecycle value |
| <b>Uncertainty</b>           | Assumptions, contingency, reserve definition, sensitivity and update trigger             | Prevent hidden padding and double counting                    |
| <b>AI and verification</b>   | Approved inputs, provisional contribution, weakness, source check and consultation       | Retain versions; restrict sensitive cost and supplier data    |
| <b>Decision and tracking</b> | Baseline, funding, owner, tolerance, forecast, reserve authority and handoff             | Record rationale, approval and result consequence             |

### A practical sequence for an executable plan

1. Confirm the controlled scope, WBS, schedule, acceptance events and financial rules.
2. Define the estimate purpose, price basis, methods, structure and level of confidence.
3. Link cost and resources to work, time, quantities, effort and accountable owners.
4. Test internal capability and capacity with the people who control those resources.
5. Decide how gaps will be closed and reflect cost, lead time and service consequences.
6. Design procurement packages, market approach and contract controls around the intended result.
7. Reconcile base cost, contingency, reserve, funding sources and approval authority.
8. Use AI to structure, compare and challenge within the approved information boundary.
9. Verify calculations, duplicates, assumptions, availability, market evidence and interfaces.
10. Approve, baseline and track expected final cost, resource availability, commitments and reserve exposure.

## T7 — Risk–Response Register — reusable tool and practical sequence

*Main-book chapter: Chapter 7 — Risk and Opportunity Management*

Reference structure

### Reusable risk-response tool

| Decision-critical field             | Required entry                                                                  | Challenge and control                                               |
|-------------------------------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------|
| <b>Objective and classification</b> | Objective affected; threat/opportunity, issue, assumption or constraint         | Start from the result; move current problems to issue action        |
| <b>Risk logic</b>                   | Cause, uncertain event and consequence                                          | Remove categories, certainty and vague impact language              |
| <b>Assessment</b>                   | Evidence, likelihood, impact, proximity, inherent and residual exposure         | Define scales; record uncertainty and dissent                       |
| <b>Response</b>                     | Action, intended effect, cost, due date and fallback                            | Confirm feasibility, funding and secondary risk                     |
| <b>Trigger and ownership</b>        | Leading indicator, threshold, risk owner, action owner and escalation authority | Replace “monitor” with observable intervention                      |
| <b>AI and verification</b>          | Approved context, provisional contribution, weakness and consultation           | Restrict sensitive vulnerabilities and allegations; retain versions |
| <b>Tracking and consequence</b>     | Status, decision, realised effect, closure evidence, handoff and lesson         | Connect register to live plans and results                          |

### A practical sequence for active risk management

1. Confirm objectives, appetite, tolerance, authority and the project context.
2. Identify uncertainty from plans, evidence, assumptions, interfaces and affected people.
3. Separate risks from issues, assumptions, constraints and existing controls.
4. Write priority threats and opportunities with clear causes, events and consequences.
5. Assess exposure with defined scales and proportionate evidence.
6. Choose responses that alter exposure and identify secondary risks.
7. Assign capable risk owners, action owners, resources and due dates.
8. Define triggers, escalation and the decision required when they occur.
9. Use AI to broaden, compare and challenge within the approved information boundary.
10. Track response effectiveness, residual exposure, realised consequences and lessons.

## T8 — Stakeholder and Governance Engagement Plan — reusable tool and sequence

*Main-book chapter: Chapter 8 — Stakeholders and Governance*

### Reference structure

### Reusable Stakeholder and Governance Engagement Plan

Use the compact version below for a live project. Expand only where consequence, law, complexity or organisational policy requires it.

| Decision-critical field      | Required entry                                                                              | Challenge and control                                                               |
|------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <b>Purpose and decision</b>  | Project result, decision, stage and user of the plan                                        | Begin with the responsibility, not a list of names                                  |
| <b>Stakeholder evidence</b>  | Role/group; interest; influence; impact/rights; contribution; source; coverage limit        | Separate evidence from inference; identify missing and overrepresented perspectives |
| <b>Governance rights</b>     | Accountable owner; recommender; verifier; consultant; approver/authoriser; escalation route | Do not equate attendance, agreement, approval and authorisation                     |
| <b>Engagement action</b>     | Objective; method/channel; accessibility; timing; owner; feedback route                     | State what the project needs to learn, decide or change                             |
| <b>Information boundary</b>  | Permitted, anonymised, approval-required and prohibited information                         | Do not profile people or expose complaints, allegations or protected data           |
| <b>Decision and response</b> | Concern/finding; evidence; decision; rationale; owner; date; communication                  | Retain dissent, conditions and unresolved uncertainty                               |
| <b>Tracking</b>              | Coverage, response quality, grievance status, decision latency and review trigger           | Measure effectiveness and consequence, not activity alone                           |

### A practical sequence

- Define the project result, decision and stage that stakeholder or governance work must support.
- Identify people and bodies by role, contribution, influence, impact and rights—not by convenience alone.
- Map authority: recommendation, verification, consultation, approval, authorisation and escalation.
- Build a representation plan and gather alternative evidence where meetings or channels are selective.
- Use AI to structure approved evidence, compare perspectives and expose gaps within the information boundary.
- Verify sentiment, coverage, authority, omissions, bias, accessibility and consequence with the relevant owners.
- Approve and apply the engagement and governance plan, record decisions and track whether engagement improves action.

The plan also created a review discipline. At each major gate, Amina would ask whether the stakeholder picture still reflected the project stage, whether delegated authority remained appropriate and whether any group was experiencing a consequence that the original analysis had missed. New evidence could change an engagement action without reopening every project decision; a material rights, safety, value or authority issue would trigger formal escalation. This kept the plan alive without allowing informal pressure to rewrite the approved purpose.

## T8A — Rivergate stakeholder and governance Context Brief

*Main-book chapter: Chapter 8 — Stakeholders and Governance*

### Context Brief

### Rivergate's Project Context Brief

Amina framed the work as a governance and engagement decision, not a request for a stakeholder list.

| Field                                | Rivergate working position                                                                                                                                                               |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b>   | Approve RGW-D07, defining governance rights, engagement priorities, grievance escalation and evidence needed before contract mobilisation                                                |
| <b>Intended result and user</b>      | Legitimate, timely decisions and engagement that protect service continuity, access, acceptance and confidence; used by the Sponsor, Project Board, Amina and delivery leads             |
| <b>Approved context and evidence</b> | RGW-D03–D06; six-zone impact map; workshop notes; redacted grievance themes; service-interruption and access records; operating roles; approved decisions RGW-DEC-01–04                  |
| <b>Known limits and uncertainty</b>  | Workshop attendance is self-selecting; sentiment cannot be generalised to all 420,000 residents and small businesses; two zones have incomplete engagement coverage                      |
| <b>Information boundary</b>          | Use anonymised or aggregated comments and role-based stakeholder descriptions; exclude identifiers, allegations, political profiling, protected attributes and confidential negotiations |
| <b>Required output</b>               | Stakeholder and Governance Engagement Plan with decision-rights map, representation record, tailored engagement actions, grievance route, owners and review triggers                     |
| <b>Verification and authority</b>    | Noah checks engagement evidence; domain leads check impacts; Amina recommends; Project Board approves governance controls; Sponsor retains reserved authority                            |

The brief prevented the system from treating every stakeholder as equivalent or inventing sentiment where evidence was absent. It required explicit 'not established' labels and asked for the evidence behind every influence, interest or sentiment claim.

## T9 — Decision-Quality Communication — reusable tool and practical sequence

*Main-book chapter: Chapter 9 — Meetings and Project Records*

### Reference structure

### Use when needed: decision-quality communication

| Decision-critical field      | Required entry                                                                            | Challenge and control                                         |
|------------------------------|-------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| <b>Interaction control</b>   | Purpose, date, chair, attendees/roles, authority, inputs and required output              | Do the people present have the authority and evidence needed? |
| <b>Verified record</b>       | Information, discussion, dissent, recommendation, decision, action, issue/risk and status | Do not let summary language change category or certainty      |
| <b>Human Decision Record</b> | Decision, authority, evidence, alternatives, rationale, conditions, owner and review      | Distinguish approval, authorisation and agreement             |
| <b>Action log</b>            | Unique ID, action, owner, due date, recipient, source, status and closure evidence        | One owner; link each action to its origin and consequence     |

| Decision-critical field     | Required entry                                                                             | Challenge and control                                                        |
|-----------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <b>Communication</b>        | Audience, objective, verified message, channel, accessibility, owner and feedback route    | Tailor form, not facts; retain conditions and uncertainty                    |
| <b>Information boundary</b> | Permitted, anonymised, approval-required and prohibited content; repository and access     | Control recording, disclosure, retention, versions and sensitive information |
| <b>Tracking</b>             | Decision latency, action closure, record corrections, audience response and review trigger | Measure whether communication and records improved action                    |

## A practical sequence

- Define the decision, recommendation, evidence or coordination result required from the interaction.
- Confirm participants, authority, pre-reads, information boundary and the record that will govern action.
- Structure the agenda around decision needs and close by reading back categories, owners, dates and unresolved matters.
- Use AI to compare approved sources, draft the record, find missing fields and prepare audience variants.
- Verify wording, authority, status, conditions, dissent, links, owners, confidentiality and accessibility.
- Approve the Human Decision Record and controlled action log; correct the record visibly when needed.
- Communicate through authorised channels and track decision latency, action closure and audience response.

The pack also established a review rhythm. Open decisions and overdue actions were checked before each governance meeting; material record corrections were reported rather than hidden; and communication feedback was linked to the issue, risk or decision it affected. This prevented the action log from becoming a graveyard of old commitments and stopped reports from presenting unresolved conditions as historical detail. The record remained useful because it was connected to the next decision, not because it was complete for its own sake.

## T9A — Rivergate meeting and records Context Brief

*Main-book chapter: Chapter 9 — Meetings and Project Records*

### Context Brief

### Rivergate’s Project Context Brief

The meeting-summary task was reframed as a record-and-communication responsibility.

| Field                              | Rivergate working position                                                                                                                                               |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b> | Create the controlled record of the 8 January 2028 mobilisation coordination meeting and support the formal mobilisation decision due by 12 January                      |
| <b>Intended result and users</b>   | Traceable recommendation, actions and conditions; consistent communication for Project Director, Board, contractor, operations and affected users                        |
| <b>Approved sources</b>            | Agenda and pre-read; attendee list and roles; approved decisions RGW-DEC-03-05; RGW-D04-D07; redacted meeting notes; action and risk registers                           |
| <b>Authority and limits</b>        | Meeting may recommend and assign delegated preparation actions; Project Director authorises mobilisation after conditions; Board retains baseline and contract decisions |
| <b>Known uncertainty</b>           | Two access points need safety inspection; one settlement has unresolved access concerns; contractor needs written instruction by 12 January                              |

| Field                       | Rivergate working position                                                                                                                                                                 |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Information boundary</b> | Use approved redacted notes and role-based records; exclude personal contact data, confidential grievances, live commercial positions and security-sensitive access details                |
| <b>Required output</b>      | Decision-Quality Project Communication Pack: verified meeting record, decision record, action log and audience-specific communications                                                     |
| <b>Verification</b>         | Amina checks category and authority; attendees verify assigned actions; relevant owners verify technical, engagement and procurement facts; decision authority approves the final decision |

## T9B — Audience-specific communication matrix

*Main-book chapter: Chapter 9 — Meetings and Project Records*

**Completed example**

### 4. Audience-specific communication

| Audience                                   | What must be communicated                                                                                              | Channel, owner and feedback                                                                    |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Contractor</b>                          | Conditional authorisation, approved route, constraints, hold/stop conditions and reporting expectations                | Controlled written instruction from authorised contract route; Jonas; acknowledgement required |
| <b>Operations and field teams</b>          | Sequence, service-continuity arrangements, safety controls, incident/escalation route and daily review                 | Mobilisation briefing and controlled field note; Marta and Elias; questions recorded           |
| <b>Affected users and small businesses</b> | What will happen, when, likely disruption, access arrangements, service contingency, grievance route and update timing | Accessible zone notice plus direct engagement; Noah; feedback and unresolved concerns logged   |
| <b>Project Board and Sponsor</b>           | Decision, evidence, residual risk, conditions, reserve/schedule exposure and review point                              | Decision brief and next governance report; Amina; exceptions escalated                         |
| <b>Results and monitoring team</b>         | Decision baseline, actions, risk status, leading indicators and review dates                                           | RGW-D08 linked to RGW-D09; Sofia; evidence gaps flagged                                        |

## T10 — Results-Focused Monitoring Review — editable stand-alone tool

*Main-book chapter: Chapter 10 — Monitoring Progress and Results*

Editable worksheet

### Reusable Results-Focused Monitoring Review

Use this stand-alone tool for a status, corrective-action, continuation, escalation, replan or stop decision. It corresponds to the completed Rivergate monitoring review in Chapter 10. Preserve approved definitions and references; do not allow a dashboard status or AI-generated explanation to become the decision.

**Completion rule: distinguish verified evidence from plausible contribution, alternatives, assumptions and unresolved questions. Record the authorised decision and action, then compare the expected effect with consequence evidence at the review date.**

#### A. Review control

| Field                                     | Your working entry |
|-------------------------------------------|--------------------|
| Project or workstream                     |                    |
| Monitoring purpose                        |                    |
| Status date and evidence cut-off          |                    |
| Decision window                           |                    |
| Intended result                           |                    |
| Intended users                            |                    |
| Information boundary and approved sources |                    |
| Accountable review owner                  |                    |

#### B. Indicator, reference and evidence

| Evidence field       | Your working entry | Control question                                                  |
|----------------------|--------------------|-------------------------------------------------------------------|
| Indicator or measure |                    | What exactly is being observed?                                   |
| Indicator level      |                    | Activity, output, outcome, benefit, readiness, risk or other?     |
| Definition and unit  |                    | Are numerator, denominator, boundary, period and unit controlled? |

| Evidence field                                    | Your working entry | Control question                                                            |
|---------------------------------------------------|--------------------|-----------------------------------------------------------------------------|
| Baseline, target, tolerance or approved reference |                    | Which comparison is authorised and date-specific?                           |
| Verified actual                                   |                    | What value is supported after checks?                                       |
| Trend                                             |                    | What changed over comparable periods?                                       |
| Disaggregation                                    |                    | Which zone, group, product, partner or segment must remain visible?         |
| Evidence source                                   |                    | Which record, version and extraction route supports the value?              |
| Evidence owner                                    |                    | Who owns and can explain the source?                                        |
| Data-quality status                               |                    | Complete, timely, consistent and fit for this decision?                     |
| Duplicates, missingness or comparability warning  |                    | What remains uncorrected, excluded or non-comparable?                       |
| Verified variance                                 |                    | Show calculation, direction and materiality against the approved reference. |

### C. Interpretation, decision and consequence

| Field                                     | Your working entry |
|-------------------------------------------|--------------------|
| Established explanation                   |                    |
| Plausible contributor                     |                    |
| Alternative explanation                   |                    |
| Assumption                                |                    |
| Unresolved question and next verification |                    |
| Decision required                         |                    |
| Authorised action                         |                    |

| Field                | Your working entry |
|----------------------|--------------------|
| Owner and due date   |                    |
| Expected effect      |                    |
| Review date          |                    |
| Consequence evidence |                    |

#### D. AI contribution and human control

| Field                    | Your working entry |
|--------------------------|--------------------|
| Approved AI contribution |                    |
| Material AI corrections  |                    |
| Human verifier           |                    |
| Decision authority       |                    |
| Retained records         |                    |

## T11 — Decision and Change Brief — reusable structure

*Main-book chapter: Chapter 11 — Decision Support and Scenarios*

Reference structure

### Use when needed: Decision and Change Brief

Use this compact structure when a project faces an option or change decision. Expand the analysis only where consequence and uncertainty justify it.

| Decision-critical field | Required entry                                                                                                         | Challenge and control                                            |
|-------------------------|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| Decision frame          | Decision, owner, deadline, intended result, current position and consequence of delay                                  | Is the request for analysis separate from the authorised choice? |
| Options                 | Current approved course, minimum credible response, substantive alternatives and staged/reversible option where useful | Do options address the same objective and mandatory constraints? |

| Decision-critical field            | Required entry                                                                                                           | Challenge and control                                            |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>Evidence and assumptions</b>    | Sources, status dates, ranges, dependencies, omissions and confidence                                                    | Which assumptions carry the recommendation?                      |
| <b>Scenarios and sensitivity</b>   | Coherent futures, key variables, switching conditions and information needed next                                        | Do not present random cases or false probabilities as evidence   |
| <b>Whole consequences</b>          | Outcome, cost, schedule, quality, risk, resources, procurement, operations, stakeholders, distribution and reversibility | Whose burden or benefit is hidden by averages or summary scores? |
| <b>AI and assurance</b>            | Approved inputs, AI contribution, model/rules, verification, independent review and unresolved uncertainty               | Can the analysis be reproduced and is it fit for the decision?   |
| <b>Recommendation and decision</b> | Recommended option, alternatives, rationale, dissent, authority, conditions, approved/rejected/deferred status           | A recommendation must not silently become a baseline change      |
| <b>Change and tracking</b>         | Affected baselines/records, owner, implementation, communication, triggers, review date and observed consequence         | What evidence will show that the decision protected value?       |

## T11A — Rivergate decision-support Context Brief

*Main-book chapter: Chapter 11 — Decision Support and Scenarios*

### Context Brief

## Rivergate's Project Context Brief

| Field                              | Rivergate working position                                                                                                                                              |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b> | Decide whether to continue the approved correction, authorise a staged Zone 5 change or begin a broader reset after the 28 August 2028 consequence review               |
| <b>Intended result and users</b>   | Protect service-reliability improvement, M6 acceptance, affordability and equitable disruption for Project Board, operations and affected users                         |
| <b>Approved evidence</b>           | RGW-D03–D09; RGW-DEC-02–07; verified 28 August indicator extract; market range; reserve position; risk and engagement records                                           |
| <b>Constraints and uncertainty</b> | USD 1.55m residual reserve before new commitment; 8–14-week equipment range; demand and outcome uncertainty; two settlements carry concentrated disruption              |
| <b>Decision rights</b>             | Amina recommends; finance, technical, operations, procurement, results and community owners verify; Project Board approves baseline/reserve change                      |
| <b>Information boundary</b>        | Use controlled ranges and redacted records; exclude live bids, supplier-confidential positions, identifiers, protected asset details, privileged advice and allegations |
| <b>Required output</b>             | Decision and Change Brief showing options, scenarios, assumptions, distributional effects, sensitivities, recommendation, authority, updates and review triggers        |
| <b>Quality test</b>                | No preferred option without traceable assumptions, a do-minimum/current-plan comparator, switching conditions and explicit unresolved uncertainty                       |

## T11B — Full option comparison and switching-condition matrices

Main-book chapter: Chapter 11 — Decision Support and Scenarios

### Completed example

| Option                                 | Whole-consequence assessment                                                                                                                                                                         | Scenario / sensitivity result                                                                                                                              | Recommendation status                                                                                                           |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <b>A — Continue current correction</b> | Lowest immediate commitment; preserves reserve; weak evidence that Zone 5 will reach the required reliability; repeat complaints and operational workload remain                                     | Only acceptable if current settings produce at least 14.5 hours/day and unique interruptions fall within 21 days; current evidence below that route        | Reject as the sole response; retain as fallback operating control                                                               |
| <b>B — Staged targeted change</b>      | Authorise specialist support, commissioning changes and conditional equipment commitment; cap total exposure at USD 0.52m; targeted disruption with safeguards; preserves at least USD 1.03m reserve | Robust across verified lead-time and service-gain ranges if order decision occurs by 12 September; second-stage commitment depends on 21-day evidence gate | Preferred with conditions                                                                                                       |
| <b>C — Immediate broader redesign</b>  | Largest potential technical improvement; USD 1.22m estimated reserve use; 6–10-week M6 pressure; wider disruption and procurement exposure; limited reversibility                                    | Preferred only if targeted response cannot achieve minimum service threshold or technical review shows a wider network constraint                          | Defer; retain as escalation option                                                                                              |
| Assumption / switching condition       |                                                                                                                                                                                                      | Current evidence                                                                                                                                           | Trigger and response                                                                                                            |
| <b>Equipment lead time</b>             |                                                                                                                                                                                                      | 8–14 weeks; no committed slot                                                                                                                              | If a compliant route cannot be secured by 12 September, do not claim M6 protection; escalate sequencing and Option C comparison |
| <b>Service response</b>                |                                                                                                                                                                                                      | Plausible gain 1.1–2.4 hours/day                                                                                                                           | If Zone 5 remains below 14.5 hours/day after 21 days, release second-stage technical decision or escalate                       |
| <b>Reserve protection</b>              |                                                                                                                                                                                                      | USD 1.55m residual; protect USD 0.34m existing exposure                                                                                                    | Total CR-08-02 commitment may not exceed USD 0.52m without new Board appraisal                                                  |
| <b>Distribution and safeguards</b>     |                                                                                                                                                                                                      | Two settlements carry concentrated disruption                                                                                                              | No field change without notice, contingency service, access control, grievance route and daily exception review                 |
| <b>Operational capacity</b>            |                                                                                                                                                                                                      | Specialist support available for initial stage; internal capacity limited                                                                                  | Marta confirms operator release and competence before permanent commissioning                                                   |

## T12 — Recovery Decision Pack — reusable structure

*Main-book chapter: Chapter 12 — Recovering Troubled Projects*

### Reference structure

### Use when needed: Recovery Decision Pack

Use this compact structure when a project is outside tolerance or likely to lose value. Expand it only where consequence and complexity require deeper analysis.

| Decision-critical field        | Required entry                                                                                                | Challenge and control                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <b>Condition and authority</b> | Threatened result, exceeded tolerance, harm, deadline, owner and decision right                               | Describe the condition; do not rely on the label “troubled”             |
| <b>Stabilisation</b>           | Immediate protections, holds, evidence preservation, communication and operating rhythm                       | What further harm could occur while diagnosis continues?                |
| <b>Diagnosis</b>               | Symptoms, verified causes, contributing conditions, constraints, unknowns and control failures                | Test chronology and interactions; do not assign blame from correlation  |
| <b>Value test</b>              | Current need, remaining benefit, feasibility, affordability, stakeholder consequence and sunk-cost separation | Is the result still worth protecting, and is this route still credible? |
| <b>Options</b>                 | Recover, reset, pause or close; whole consequences, reversibility and authority                               | Do not force every project back to its original baseline                |
| <b>Decision and reset</b>      | Approved course, funding, baseline changes, rejected/deferred alternatives and rationale                      | Update plans, contracts, registers, records and messages                |
| <b>Exit and escalation</b>     | Recovery indicators, thresholds, owners, review date and trigger for deeper reset or closure                  | How will the project know it has left recovery?                         |
| <b>AI and assurance</b>        | Approved evidence, AI contribution, verification, sensitive-information controls and unresolved uncertainty   | Can another reviewer reproduce the diagnosis and decision?              |

### T12A — Rivergate recovery Context Brief

*Main-book chapter: Chapter 12 — Recovering Troubled Projects*

### Context Brief

### Rivergate’s Project Context Brief

| Field                              | Rivergate working position                                                                                                         |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b> | Diagnose the Zone 5 condition, stabilise delivery and recommend recovery, reset, pause or closure to the Project Board             |
| <b>Intended result and users</b>   | Restore a credible route to reliable service, accepted zones and safe transition for Board, operations, funders and affected users |
| <b>Evidence cut-off</b>            | 26 September 2028 evidence gate; controlled records RGW-D03–D09, CR-08-02 and RGW-DEC-08                                           |
| <b>Verified condition</b>          | Zone 4 improving; Zone 5 at 13.8 h/day, telemetry 76%, repeat interruptions 11 in 21 days, night-shift competence 64%              |

| Field                | Rivergate working position                                                                                                                      |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Constraints          | M6 30 November; M7 31 March 2029; M8 30 June 2029; USD 1.27m reserve after first-stage commitment; limited specialist capacity                  |
| Information boundary | Use controlled and redacted evidence; exclude identifiers, allegations, privileged advice, protected asset detail and live commercial positions |
| Required output      | Recovery Decision Pack with diagnosis, stabilisation, options, recommendation, authority, revised controls and exit criteria                    |
| Quality and approval | Domain-owner verification; Amina recommends; Project Board approves recovery, reset or closure and baseline changes                             |

## T12B — Recovery governance and assurance role map

*Main-book chapter: Chapter 12 — Recovering Troubled Projects*

Completed example

| Recovery governance role        | Primary responsibility                                                                  | Control question                                                                |
|---------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Project Board / sponsor         | Approve reset, major reserve use, pause or closure; resolve strategic barriers          | Is the remaining value worth the exposure and is the decision within authority? |
| Project manager / recovery lead | Integrate diagnosis, stabilisation, baseline, owners and consequence tracking           | Does one recovery system connect evidence to action?                            |
| Domain owners                   | Verify technical, operational, financial, procurement, stakeholder and quality evidence | What is established within this mandate, and what remains uncertain?            |
| Independent assurance           | Challenge coherence, assumptions, feasibility and exit evidence                         | Would the same evidence support the stated recovery confidence?                 |
| Communications and engagement   | Explain decisions, protections, disruption and routes for feedback                      | Are affected people receiving accurate and usable information?                  |

## T12C — Recovery diagnosis verification matrix

*Main-book chapter: Chapter 12 — Recovering Troubled Projects*

Completed example

| Verification question               | Finding                                                                                                           | Decision effect                                      |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| What work is actually governing M6? | Integrated pressure control, telemetry, operator readiness and acceptance evidence—not remaining civil quantities | Additional crews are not the primary recovery action |
| What changed after RGW-DEC-08?      | The 21-day gate failed in Zone 5; conditional second-stage release did not occur                                  | A new Board decision is required                     |
| What capacity exists?               | Temporary specialist support is available; internal night-shift competence is 64%                                 | Recovery must include operations and training        |
| What is the commercial position?    | A compliant assembly route can be secured for January delivery if committed by 9 October                          | M6 for Zone 5 must reset; M7 can still be protected  |

| Verification question      | Finding                                                                       | Decision effect                                                     |
|----------------------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------|
| What harm is concentrated? | Two settlements carry most service disruption and complaint recurrence        | Contingency service and daily engagement remain recovery conditions |
| What money remains?        | USD 1.27m reserve after the first-stage commitment; existing exposures remain | Recovery spend must preserve residual protection                    |

## T12D — Recovery stabilisation and diagnosis record

*Main-book chapter: Chapter 12 — Recovering Troubled Projects*

Completed example

### 1. Stabilisation and diagnosis

| Control            | Verified action or finding                                                                             | Owner / timing                      |
|--------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------|
| Service and safety | Hold Zone 5 acceptance and pressure increase; maintain contingency supply and access controls          | Amina / Noah; immediate             |
| Evidence           | One reconciled incident, telemetry, defect, action and decision cut-off; no silent repair of gaps      | Sofia; daily for 10 days            |
| Technical          | Independent configuration and interface review; confirm equipment and test route                       | Elias; 4 October                    |
| Operations         | Temporary specialist cover; competence plan for all shifts; maintenance and spares check               | Marta; 8 October                    |
| Commercial         | Protect notices and option validity; verify January delivery route without disclosing live negotiation | Jonas; 9 October                    |
| Governance         | Daily recovery cell within delegated authority; Board decision reserved for reset and reserve          | Amina / Project Director; immediate |

## T13 — Delivery-Readiness and Transition Pack — reusable structure

*Main-book chapter: Chapter 13 — Quality, Readiness and Transition*

Reference structure

### Reusable Delivery-Readiness and Transition Pack

Use this compact structure for a release, commissioning, handover or transition decision. Tailor the gates to the solution and consequence.

| Decision-critical field  | Required entry                                                                                          | Challenge and control                                           |
|--------------------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| Scope and configuration  | Exact output, version, location, users and interfaces proposed for acceptance or release                | Is this the same configuration that was verified and validated? |
| Requirements and quality | Acceptance criteria, methods, results, defects, waivers and source evidence                             | Are critical conditions explicit and traceable?                 |
| Readiness gates          | Safety, technical, operational, information, security, maintenance, support, user and contractual gates | Do not average a failed mandatory gate into an overall score    |

| Decision-critical field             | Required entry                                                                                                 | Challenge and control                                             |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>Acceptance decision</b>          | Accept, conditional accept, hold or reject; authority, date, residual items and rationale                      | Separate completion, acceptance and transition authority          |
| <b>Transition plan</b>              | Approach, schedule, continuity, migration, communications, training, data, spares, support and decommissioning | Who does what while accountability is shared?                     |
| <b>Contingency and rollback</b>     | Failure conditions, isolation/backout route, decision owner, resources and rehearsed evidence                  | Can the project recover safely if transition fails?               |
| <b>Handover and early operation</b> | Accountability transfer, accepted baseline, warranties, defects, support, reporting and review                 | What remains with the project or supplier after handover?         |
| <b>AI and assurance</b>             | Approved sources, AI contribution, verification, sensitive information and unresolved uncertainty              | Has AI summarised evidence without inventing status or authority? |

## T13A — Rivergate readiness Context Brief

*Main-book chapter: Chapter 13 — Quality, Readiness and Transition*

### Context Brief

### Rivergate's Project Context Brief

| Field                              | Rivergate working position                                                                                                                                  |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b> | Determine technical acceptance, phased release and operational transition following the Chapter 12 recovery                                                 |
| <b>Intended result and users</b>   | A safe, maintainable, evidence-controlled service that operations can own and users can rely on                                                             |
| <b>Evidence cut-off</b>            | 22 March 2029 readiness review; RGW-D03, D06–D10, RGW-DEC-09 and recovery exit evidence                                                                     |
| <b>Milestones</b>                  | M7 technical completion and system acceptance 31 March 2029; M8 operational transition 30 June 2029                                                         |
| <b>Known gaps</b>                  | Unwitnessed isolation test, two incomplete calibration chains, night-shift drill not passed and seventeen asset-data inconsistencies                        |
| <b>Information boundary</b>        | Use approved quality, readiness and aggregated competence evidence; exclude identifiers, credentials, protected drawings and privileged/commercial material |
| <b>Required output</b>             | Delivery-Readiness and Transition Pack with gates, defects, acceptance decision, handover plan, accountability and early-operations controls                |
| <b>Quality and approval</b>        | Elias verifies technical evidence; Marta accepts operating readiness; Amina integrates; Project Board authorises acceptance and transition                  |

## T13B — Readiness closure-action schedule

*Main-book chapter: Chapter 13 — Quality, Readiness and Transition*

Completed example

### 2. Closure actions before M7

| Action                                                                 | Owner         | Due         | Closure evidence                                          |
|------------------------------------------------------------------------|---------------|-------------|-----------------------------------------------------------|
| Repeat emergency isolation demonstration with accepting authority      | Elias         | 26 Mar 2029 | Signed test record and exception closure                  |
| Complete two calibration chains and reconcile monitoring configuration | Sofia / Elias | 27 Mar 2029 | Certificates, traceability and dashboard source check     |
| Correct seventeen as-built and asset records                           | Elias / Marta | 28 Mar 2029 | Approved configuration and asset-data reconciliation      |
| Complete night-shift response drill                                    | Marta         | 29 Mar 2029 | Practical assessment; gaps and retraining recorded        |
| Confirm residual-defect and warranty schedule                          | Jonas / Amina | 29 Mar 2029 | Owner, remedy, date, payment and escalation for each item |

## T13C — Transition and handover plan

*Main-book chapter: Chapter 13 — Quality, Readiness and Transition*

Completed example

### 4. Transition and handover plan

| Period / gate                            | Accountability and activity                                                                                          | Evidence / trigger                                                                       |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <b>1–14 April: controlled operation</b>  | Project and operations jointly control; supplier supports; verify incident and defect response                       | Daily incidents, service stability, telemetry, user exceptions and configuration changes |
| <b>15 April–31 May: phased ownership</b> | Operations leads routine control; project retains defect, integration and supplier coordination                      | Weekly readiness and residual-defect review; rollback trigger remains active             |
| <b>1–24 June: handover confirmation</b>  | Complete competence, knowledge, data, support, spares, contracts and stakeholder communications                      | Signed gate evidence and future-owner acceptance                                         |
| <b>30 June: M8 decision</b>              | Transfer full operational accountability if all mandatory gates pass; archive accepted baseline and open obligations | RGW-DEC-11 / formal handover record; otherwise hold and escalate                         |
| <b>Initial operation support</b>         | Retain named technical and supplier support for agreed period after M8                                               | Warranty, incident and residual-defect terms; benefits baseline protected                |

## T14 — Benefits and Learning Review — reusable structure

*Main-book chapter: Chapter 14 — Benefits, Evaluation and Learning*

Reference structure

### Reusable Benefits and Learning Review

Use this compact structure at an interim, post-transition or final benefits review. Select questions and evidence in proportion to the decision.

| Decision-critical field      | Required entry                                                                        | Challenge and control                                           |
|------------------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <b>Purpose and users</b>     | Decision, review date, intended users, authority and consequence                      | What choice will this evidence support?                         |
| <b>Results chain</b>         | Problem, outputs, outcomes, benefits, assumptions and owners                          | Has the causal logic changed since approval?                    |
| <b>Evidence position</b>     | Baseline, target, actual, source, quality, distribution and limitation                | Do not convert incomplete data into a confident result          |
| <b>Contribution</b>          | Mechanism, timing, alternative explanations, comparative evidence and confidence      | Distinguish contribution from exclusive attribution             |
| <b>Unintended effects</b>    | Positive, negative, expected, unexpected and distributional changes                   | Whose experience is absent from the average?                    |
| <b>Sustainability</b>        | Ownership, capability, funding, maintenance, incentives, environment and dependencies | Will net benefits continue without exceptional project support? |
| <b>Decision and action</b>   | Sustain, adapt, scale, stop, investigate or close; owner and review trigger           | Record what is not authorised and what remains uncertain        |
| <b>Learning and transfer</b> | Lesson, evidence, context, future control and recipient                               | Avoid vague lessons that have no owner or design consequence    |
| <b>AI and assurance</b>      | Approved sources, AI contribution, verification, bias, privacy and sensitive evidence | Has the narrative remained traceable to evidence and limits?    |

### T14A — Rivergate benefits Context Brief

*Main-book chapter: Chapter 14 — Benefits, Evaluation and Learning*

Context Brief

#### Rivergate's Project Context Brief

| Field                              | Rivergate working position                                                                                     |
|------------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Responsibility and decision</b> | Conduct the M9 benefits and learning review and recommend sustain, adapt, scale, investigate or close actions  |
| <b>Intended result and users</b>   | Determine whether reliable, safer and more accountable service emerged for users, operations, RRSA and funders |
| <b>Evidence cut-off</b>            | 31 December 2029; RGW-D02, D07–D11, accepted configuration, early-operation records and contextual data        |

| Field                        | Rivergate working position                                                                                                       |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Baseline and targets</b>  | Stage 1 indicator definitions and six-month targets; construction completion is not evidence of benefit                          |
| <b>Known influences</b>      | Source conditions, separate electricity work, staffing changes, user behaviour and measurement improvements                      |
| <b>Information boundary</b>  | Use controlled, aggregated and redacted evidence; exclude identifiers, privileged material and protected asset details           |
| <b>Required output</b>       | Benefits and Learning Review with results, contribution, distribution, unintended effects, sustainability, decisions and lessons |
| <b>Quality and authority</b> | Sofia verifies evidence; domain and stakeholder review; Amina recommends; Project Board decides and assigns future ownership     |

## T14B — Benefits learning and transfer record

*Main-book chapter: Chapter 14 — Benefits, Evaluation and Learning*

Completed example

### 4. Learning and transfer record

| Lesson                                                       | Evidence                                                                            | Future control                                                              |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <b>Operational readiness belongs on the critical path</b>    | Recovery showed that competence, telemetry and maintenance constrained accepted use | Include readiness gates, owner and evidence in every schedule baseline      |
| <b>Averages hide distribution</b>                            | Overall service target was met while Zone 6 remained below intended performance     | Require zone/user disaggregation before benefits claims                     |
| <b>Better data can initially worsen reported performance</b> | De-duplication and improved detection changed incident and complaint trends         | Preserve definitions, version changes and interpretation notes              |
| <b>Benefits ownership must outlive the project</b>           | Some targets remain vulnerable after closure                                        | Assign owner, resources, trigger and review date before project dissolution |
| <b>AI accelerates synthesis but not causal judgement</b>     | Initial review overclaimed attribution and scale readiness                          | Require alternative explanations, limitations and human evaluative decision |

## T15 — AI-Assisted Project Operating Procedure — reusable structure

Main-book chapter: Chapter 15 — AI-Assisted Project Workflow

Reference structure

### Reusable AI-Assisted Project Operating Procedure

Use this compact structure to design one responsibility-led workflow. Do not begin with organisation-wide automation.

| Decision-critical field   | Required entry                                                                                | Challenge and control                                                   |
|---------------------------|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Responsibility and value  | Duty, decision, users, intended result, baseline and success measure                          | Does the workflow improve real project work or only create more output? |
| Scope and trigger         | Start event, end condition, frequency, work class and exclusions                              | What must happen when the context changes?                              |
| Roles and authority       | Work owner, operator, information owner, reviewer, approver and workflow owner                | Can every material action be attributed to a person?                    |
| Information and tools     | Approved sources, classification, access, retention, service and fallback                     | What remains outside AI and who approves exceptions?                    |
| Work brief                | Context, definitions, constraints, assumptions, required output and uncertainty rules         | Has the system been told not to fill evidence gaps?                     |
| Verification and approval | Checks, domain review, consultation, correction, release and decision authority               | Is review proportionate to consequence and completed before use?        |
| Records                   | Source set, system/version, output, corrections, decision, actions, incidents and consequence | Can a later reviewer reconstruct the material chain?                    |
| Escalation and change     | Stop triggers, incident route, tool/policy change, outage, rollback and retirement            | Who can suspend the workflow and on what evidence?                      |
| Performance and learning  | Cycle time, rework, quality, incidents, decision effect, review date and owner                | Continue only when evidence supports value and acceptable risk          |

### T15A — Operating-procedure identity and boundary

Main-book chapter: Chapter 15 — AI-Assisted Project Workflow

Completed example

### AI-Assisted Project Operating Procedure — completed example

#### 1. Procedure identity and boundary

| Field     | Controlled entry                                                                      |
|-----------|---------------------------------------------------------------------------------------|
| Procedure | PMO-AI-01 — Monthly Results and Decision Review                                       |
| Purpose   | Support governance decisions with faster, source-linked and verified project evidence |

| Field                  | Controlled entry                                                                                                                                    |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Applies to</b>      | Approved projects using the authorised environment; moderate-consequence review unless separately approved                                          |
| <b>Does not permit</b> | Automated approval, unsupervised distribution, silent source repair, personal/confidential data outside boundary or replacement of domain judgement |
| <b>Owner / version</b> | PMO workflow owner; Version 1.0; review after 30 days and on material tool/policy change                                                            |
| <b>Fallback</b>        | Use the existing manual review process if the service, source connection or control record is unavailable                                           |

## T15B — Workflow review and escalation triggers

Main-book chapter: Chapter 15 — AI-Assisted Project Workflow

Completed example

### 3. Review and escalation triggers

| Trigger                                                    | Required response                                                                                    | Authority                                       |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| <b>Sensitive or prohibited information detected</b>        | Stop, preserve record, notify information/security owner and follow incident procedure               | Information owner / security                    |
| <b>Material source conflict or unsupported claim</b>       | Hold management work product; resolve with source and domain owner; record uncertainty if unresolved | Work owner / domain reviewer                    |
| <b>High-consequence decision or affected rights</b>        | Increase review, consultation and approval; do not use moderate-tier workflow unchanged              | Governance / legal / ethics authority           |
| <b>Tool, model, integration or terms change</b>            | Suspend or limit use until representative testing and approval                                       | Workflow owner / authorised technology function |
| <b>Repeated error, incident or excessive review burden</b> | Investigate cause; redesign, restrict or retire workflow                                             | Workflow owner and sponsor                      |
| <b>Service outage or unavailable records</b>               | Use manual fallback; reconcile records before resumption                                             | Work owner                                      |

## T16 — Live-Responsibility Commitment and 30-Day Test

Main-book chapter: Conclusion — You Remain Accountable

Editable worksheet

### Your Live-Responsibility Commitment

Complete this before beginning the next use. Keep it with the project record. The commitment is deliberately short: its purpose is to make responsibility, evidence, authority and consequence visible before speed takes over.

| Commitment field                         | Guidance prompt                                                                                              | Your entry |
|------------------------------------------|--------------------------------------------------------------------------------------------------------------|------------|
| <b>Live responsibility</b>               | What project duty will you perform?                                                                          |            |
| <b>Intended result</b>                   | What should improve, for whom and why does it matter?                                                        |            |
| <b>Required work product or decision</b> | What must be produced, recommended or decided?                                                               |            |
| <b>Permitted AI contribution</b>         | What may AI assist with, and what must it not do?                                                            |            |
| <b>Evidence and information boundary</b> | Which sources, versions, definitions and classifications govern the work?                                    |            |
| <b>Verification and consultation</b>     | Which facts, calculations, assumptions, omissions and stakeholder perspectives must be checked, and by whom? |            |

| Commitment field                            | Guidance prompt                                                                         | Your entry |
|---------------------------------------------|-----------------------------------------------------------------------------------------|------------|
| <b>Accountable owner and decision right</b> | Who owns the work, who reviews it and who may authorise action?                         |            |
| <b>First action and date</b>                | What will be done next, by whom and by when?                                            |            |
| <b>Result measure and review point</b>      | How will you know whether the action improved the project, and when will you review it? |            |
| <b>Stop or escalation trigger</b>           | What condition requires pause, manual fallback, wider review or withdrawal?             |            |

## Use the next 30 days to prove the whole route

A useful first month is not a technology rollout. It is a controlled test of the complete responsibility-to-result route.

| Period            | Management focus                                                                                                                              |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Days 1–5</b>   | Define the responsibility, intended result, owner, decision right, information boundary, stop rules and baseline.                             |
| <b>Days 6–10</b>  | Prepare the Project Context Brief and controlled evidence set. Resolve obvious version and definition conflicts before generation.            |
| <b>Days 11–15</b> | Perform the AI-assisted work within the approved boundary. Preserve the work brief, source identity, material output and tool/version record. |
| <b>Days 16–20</b> | Pass the Verification Gate. Check high-consequence claims completely, consult the relevant owners and record corrections and uncertainty.     |
| <b>Days 21–25</b> | Integrate the verified work into the management work product, make or recommend the authorised decision and document the rationale.           |
| <b>Days 26–30</b> | Review the consequence. Compare the full cycle with the baseline, capture benefits and harms, then continue, improve, restrict or stop.       |

Do not change every variable at once. A bounded test lets you understand whether performance changed because of better evidence, clearer instructions, stronger review, the AI service or another factor. Preserve enough of the route to learn from both success and failure.

Make it safe to report a weak output, a near miss or a decision not to use AI. The purpose of the test is not to prove enthusiasm. It is to establish whether the practice is useful, responsible and sustainable in your context.