

Project Delivery Office PIO Process

PIO Definition: A PIO is a Project Initiation Overview document that is a high level project request identifying the business need or opportunity to create a new product or service. If applicable the PIO should state project phases, example: phase one could be to gather estimates, phase 2 to implement key deliverables.

The PIO Process will determine if the project request fits within the organization and contribute to meet business objectives. PIOs are created by an Originator (Business area employee or contractor, ITMB employee or contractor) and submitted to the Portfolio Management Committee for review, evaluation and approval to proceed to the next step of project implementation.

PIO Process Details:

- The Originator meets with an ITMB Sponsor to secure approval before starting work on the PIO
- The Originator acquires the PIO template:
<http://gww.msdc.gov.bc.ca/itmb/adestandards/templates/pm/preproject/pio.htm>
- The Originator completes the PIO with as much information as possible but keeping the document to a minimum length
- The Originator submits the PIO to: educ.pdo@gov.bc.ca for the Portfolio Management Committee review
- The Portfolio Committee will meet on a bi-weekly basis. The meeting dates for the start of fiscal 2007/08 are:

Apr 4	Apr 18	May 2	May 16	May 30	Jun 13
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- The PIO will be added to the Committee agenda, the Committee will review each PIO
- If the PIO is endorsed, the Committee will evaluate the PIO based on the criteria (outlined in the PIO check list)
- The Committee may contact the Originator asking for additional information
- The Committee may request the Originator, ITMB and/or Business Sponsor to attend a meeting and present the PIO
- The PDO will contact the Originator after the Committee has reviewed the PIO to advise the status and next steps
- Approved PIOs are sent to the PDO for project initiation, including resource management.

Emergency PIO Definition:

Any project request that must be approved prior to the next scheduled Portfolio Management Committee meeting due to a Government, Business or Ministry policy, legislated or legal reason request or change.

- The Originator will send the completed PIO to educ.pdo@gov.bc.ca identifying in the subject line: Urgent PIO
- The PDO will present the PIO for approval at the next ITMB Management meeting. (Held every Monday)
- The PDO will advise the Originator of outcomes, project initiation will begin for approved PIOs

Project Delivery Office PIO Check List

PIO Submission and Lead Time

- Send completed PIO to the ITMB Project Delivery Office via educ.pdo@gov.bc.ca Submit with as much information as possible to assist the review and approval process.
- Lead Time – Submit PIO as far in advance as possible to ensure evaluation, approval, and release scheduling. Allow 4-6 weeks for the PIO process, this is time required to review with your sponsor, send to PDO for Committee evaluations, time for questions/answers (this is up to but not including the procurement process). Allow 6-8 weeks for a procurement process (includes RFP, SOW, RFQ, NOI, etc)
- PIOs require Business and ITMB Sponsor approval prior to submission.

Release Planning

A release is a description of work that is to be delivered within a particular timeframe. ITMB will operate with a system of quarterly releases as follows:

Release 1	Summer	April -- June
Release 2	Fall	July -- September
Release 3	Winter	October -- December
Release 4	Spring	January -- March

- When preparing a PIO if applicable identify the scope of work to be done within a Release period and submit the PIO following the lead time guidelines.

PIO Criteria

- Use the following table as a guide in documenting the key criteria and preparing a business case, document why the project should be initiated:

1. Customer/Client Benefit	It will benefit a wide range of customers and clients to the Ministry. This project will improve service quality and delivery to the customers and clients to the Ministry.
2. Strategic	This project represents the strategic objectives of the ITMB, the Ministry of Advanced Education or the Ministry of Education. It will meet a business objective or is an opportunity to implement a solution or product that will meet the strategic direction within the organization.
3. Operational	This project is necessary from an

	operational perspective. The project is considered “good business practice” and will improve the day to day operations of the organization.
4. Governance	This project is mandatory due to a government policy, direction or legal reasons. Ex: Ministry re-Org or Cabinet shuffle
5. Risk Mitigation	This project is necessary as it will alleviate a technical or business risk currently existing within organization.
6. Financial Viability	This project is necessary as there is a cost benefit or economies of scale will be realized. (<i>Reductions in cost per application or product resulting from increased production, realized through operational efficiencies</i>)

PIA and Application Security

If a PIA is necessary or if there is a new application or security change to an application, the PIO Originator or Project Manager will be asked to attend a PRMB/ITMB Security orientation meeting. The Project Manager will need to determine Security and Privacy requirements and potential costs. Project plans will need to be updated based on these requirements.

The Security and Privacy contact is Wendy Vermaning.

Email: Wendy.Vermaning@gov.bc.ca.

Project Links and Dependencies

Projects must be analyzed for possible links or dependencies to other projects and/or applications (e.g. BCeSIS, CDW, EDW, IVR, SSB Data Store, Strategic Architecture, TSW, etc.).

Budget

- If a PIO is over a 100,000K a cost benefit analysis is required and should be attached
- Verify budget availability with your ITMB sponsor prior to submitting to the PDO
- Ensure budget estimates are complete with the Employee, Contractor, and Hardware or Software costs. If you need assistance with budget estimates contact the PDO.