**PROGRAM/PROJECT REVIEW**

1. **SCOPE**

This Quality Work Instruction (QWI) defines the Enterprise Project Management Office (EPMO) procedure to provide periodic State Chief Information Officer (SCIO) program or project reviews. The Program/Project Review procedure is a Decision Point (DP) within the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) and requires SCIO approval.

1. **OWNER**
   1. The Enterprise Project Management Office (EPMO) Director owns this QWI. No changes, additions or alterations may be made without the owner’s written approval.
2. **REFERENCE DOCUMENTS**

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| --- | --- |
| **DOCUMENT IDENTIFICATION** | **DOCUMENT TITLE** |
| 0100-0100-005-B | **MANAGEMENT REVIEW AND DELIVERABLES** |
| 0100-0800-010-B | **FORMS AND RECORDS CONTROL** |
| 0300-0300-005-B | [PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) |
| 0600-0600-005-B | **CORRECTIVE ACTION PROCESS** |
| 0700-0700-005-B | **PREVENTIVE ACTION PROCESS** |

1. **ASSOCIATED FORMS**

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| **FORMS IDENTIFICATION** | **FORM TITLE** |
| 0300-0310-015-D | [PROJECT FINANCIAL ASSESSMENT FORM](https://it.nc.gov/media/1007/open) |
| 0300-0370-005-D | [PROJECT WEEKLY STATUS REPORT FORM](https://it.nc.gov/media/1034/open) |
| 0300-0375-005-D | [PROGRAM/PROJECT REVIEW FORM](https://it.nc.gov/media/1036/open) |
| 0810-0810-005-D | [QUALITY CONTROL DECISION POINTS](https://it.nc.gov/media/309/open) |

1. **DEFINITIONS**

* NONE

1. **PROCEDURE**

A Program/Project Review DP provides the SCIO and project stakeholders with status information to inform; or, obtain a decision, approval or commitment. The Project Manager (PM) provides the information using the [0300-0375-005-D PROGRAM/PROJECT REVIEW FORM](https://it.nc.gov/media/1036/open) as a presentation format. A Program/Project Review may be established as a DP at any point during the project life-cycle.

* 1. The Project Management Advisor (PMA) initiates the Program/Project Review DP process by creating a DP in the DP Document Library.
  2. The PM, in coordination with the Business Owner, completes [0300-0375-005-D PROGRAM/PROJECT REVIEW FORM](https://it.nc.gov/media/1036/open) as described below:
     1. **Review (Quad Chart)** (Slide 1) - Provides high-level project information based on the Project Charter, current cost status, current schedule status, and lists Key Issues and Risks. *(Note: Budgetary Information includes Budget Code, Fund Company, Fund Code and Cost Center.)*
     2. **Governance (Organization Chart)** (Slide 3) - Provides an Organization Chart depicting key elements of the project team (PM and core team members), key enablers (e.g., technical, financial, procurement leads) and the relationship of the team to Business Owner(s) and executive steering/governance.
     3. **Financial Summary** (Slide 4) **-** Expands on Quad Chart “Section 3.0 Cost” using the project’s current [0300-0370-005-D PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) and/or [0300-0310-015-D PROJECT FINANCIAL ASSESSMENT FORM](https://it.nc.gov/media/1007/open).
     4. **Schedule** (Slide 5) - Expands on Quad Chart “Section 4.0 Schedule” using the project’s current schedule (Gantt Chart). Depict key milestones, decision points and key deliverables, incorporating cost for phases, summary tasks and deliverables where possible.
     5. **Issues/Risks and Mitigation** (Slide 6) - Expands on Quad Chart “Section 5.0 Key Issues and Risks” based on the project’s internal issue and risk data in the Touchdown System.
     6. **Closing or Decision** (Slide 7) - Provides information to request a decision and/or close the review. Include pertinent additional information, closing/concluding comments; questions, recommendations, alternatives; and information to request decision as warranted by the brief and occasion.
  3. The EPMO Director coordinates with the SCIO and agency to establish a review meeting with the appropriate leadership and stakeholders.
  4. The PMA documents the meeting to include the SCIO’s authorization to proceed or decision to suspend, as well as any Preventive or Corrective Action required. Following approval of the meeting minutes, the EPMO provides revision requirements in accordance with **0600-0600-005-B CORRECTIVE ACTION PROCESS** or **0700-0700-005-B PREVENTIVE ACTION PROCESS** as appropriate.
  5. The PM will store the meeting minutes in the Project Site Document Library in the Touchdown System.

1. **RECORDS**
   1. Unless otherwise specified in this Procedure/QWI, Records shall be maintained in accordance with **0100-0800-010-B FORMS AND RECORDS CONTROL** procedure.
2. **REASON FOR CHANGE**
   1. Initial issue.
   2. Change EPMO Manager to EPMO Director.