Prioritize Projects
Process Specification

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1. Introduction

1.1 Purpose and Scope

1. The purpose of this document is to define the business process[1] called "Prioritize Projects".
2. This document describes the scope, triggers, results, risks, controls, service levels and Key Performance Indicators (KPIs) for the process "Prioritize Projects". This document also defines the process design by listing the tasks to be performed, the flow of activity between tasks, and the roles responsible for each task.

1.2 Assumptions and Limitations

3. The process design is not intended to address all possible exceptions, which may occur except where explicitly required to implement a process control, or where the exception is thought to occur 20% or more of the times the process is exercised.
4. The process will not check upstream processes for quality or completeness. The trigger from upstream processes is assumed to be of the necessary quality and completeness. Inconsistencies are reported to the process steward for resolution.
5. Throughout the process, multiple controls exist where preparation, review, and approval tasks occur. Where rework is required as a result of these tasks, the preceding task is responsible for addressing the feedback, unless otherwise explicitly indicated in the process model. Iterations may continue until an acceptable outcome is achieved.
6. The ideation stage is designed to capture a broad spectrum of ideas from across the organization. Ideas may be accepted, parked for future consideration, or rejected.

   However, the ideation stage may be repurposed to function as a controlled intake mechanism that accepts only pre-screened, project-worthy ideas. If such a repurposing occurs, early-stage idea assessment would take place as an upstream process.

– End of Section –

[1] Business process and process have the same meaning in this document.

2. Process Overview

2.1 Process Scope

7. This process covers the intake, evaluation, prioritization, and approval of ideas and project proposals. It begins with screening ideas and ends with executive approval of the final project portfolio, ensuring that only strategically aligned, high-value initiatives advance to initiation.

2.2 Process Results

8. When complete, the successful process will have provided the following:
   a. Submitted ideas are reviewed, and decision outcomes are communicated.
   b. Proposed projects are reviewed, ranked (excluding those that are rejected), and decision outcomes are communicated.
   c. Project portfolio is prepared factoring new or updated proposed projects, ranked, approved and communicated.
   d. Idea and proposed project backlogs are maintained.
   e. Reports are produced and communicated.
   f. All related artifacts are recorded.
9. When complete, the process may have provided the following situational results:
   a. N/A
10. When complete, the process may have provided the following deliverables:
   a. Project portfolio
   b. Business case
   c. Funding case
   d. Ad-hoc reports
   e. Pre-portfolio backlog

2.3 Process Triggers

11. The following table describes the possible triggers and the associated business events for the process "Prioritize Projects".

Table 2-1 | Triggers & Business Events

Trigger (link to process model)	**Business Event**
"A business need or opportunity is identified"	A business need or opportunity is identified in response to, but not limited to, a strategic event, an operational event, a regulatory event, a market or external event, a technology event, or a risk event.
"A pre-portfolio backlog need is identified"	An event occurs that affects the status, information, or readiness of an idea, proposed project, or approved project not yet scheduled into the portfolio.
"A reporting need is identified"	A need arises to provide visibility into the status of ideas, proposed projects, the pre-portfolio pipeline, or the approved project portfolio to support decision-making or transparency.
"A portfolio revision need is identified"	A need arises to adjust the approved project portfolio because of a change in, but not limited to, strategic direction, performance outcomes, resource or budget conditions, or an executive directive.
"Process issue submitted"	As part of process continuous improvement, a process issue is submitted to the Process Steward for review.
"Per process performance reporting schedule"	As part of process continuous improvement, process performance report(s) are issued per the performance reporting schedule and provided to the Process Steward for review.

2.4 Process Context

12. Refer to the Process Group Map "MDL_48 Change Enterprise" to see the relationships between process "Prioritize Projects" and other processes within this process group.

13. Process relationships in addition to those in the above Process Group Map are shown in Figure 2-1. Refer to Section 2.4 in the Process Specification Template – Guide for information on process relationships.

    Note: The above Process Group Map shows all relationships to this process.

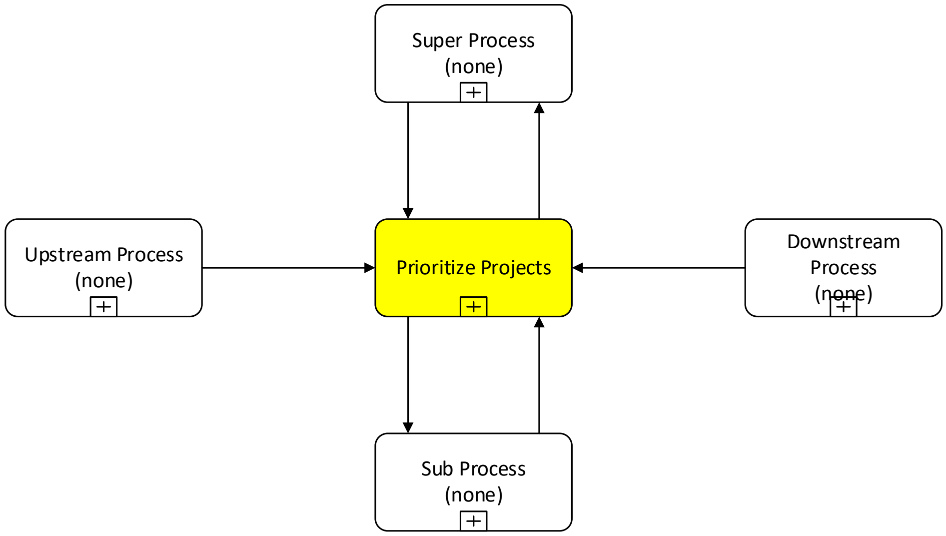

Figure 2-1: Process Context Diagram

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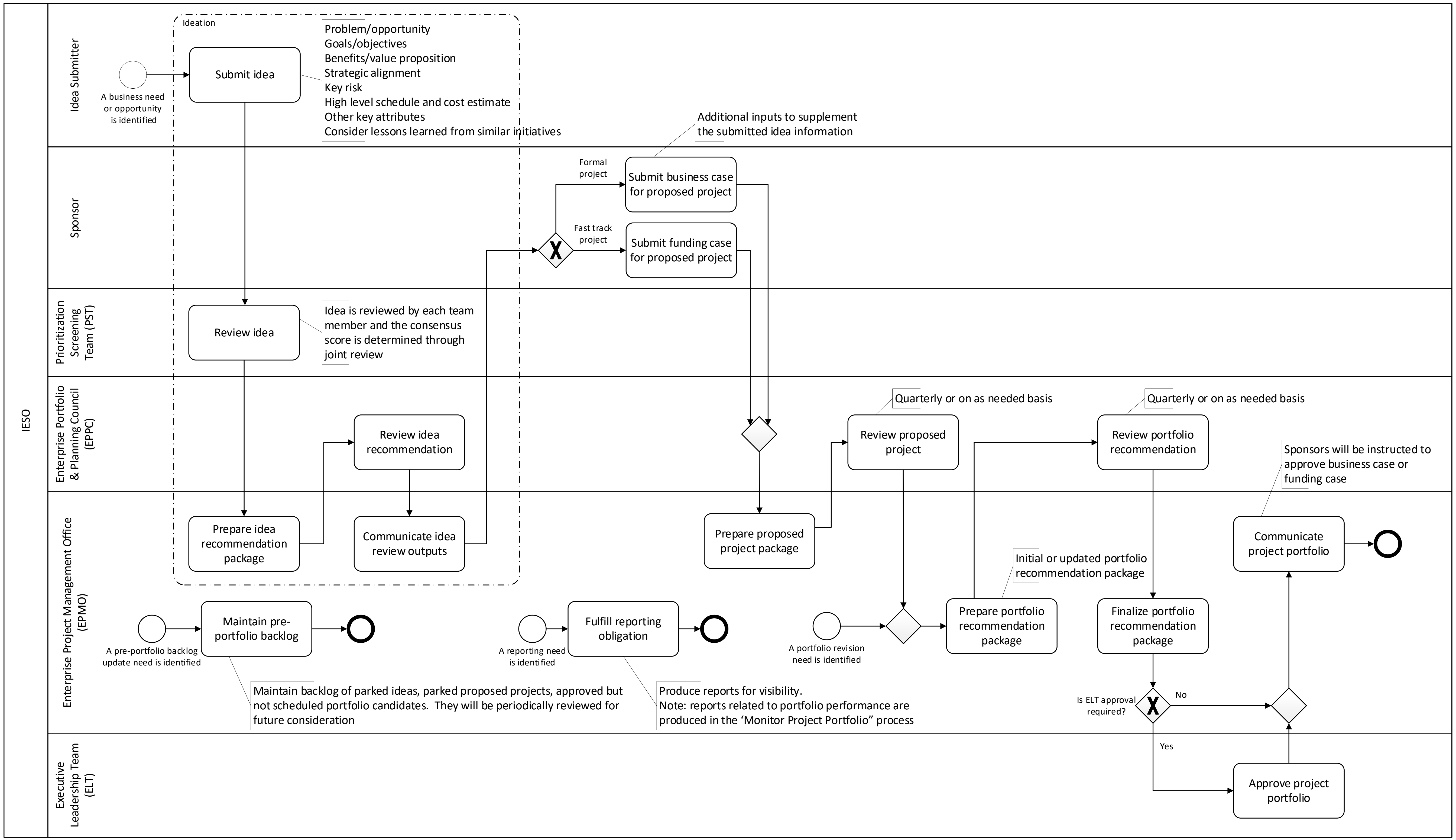
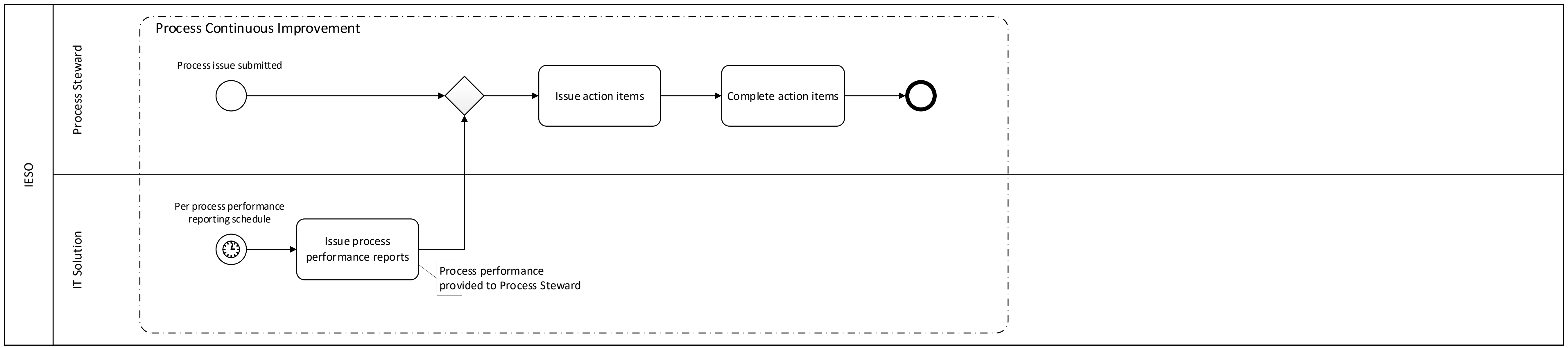
3. Process Model

Prioritize Projects - Process Model - Page 1 **Links to sections: 4.1 Roles and 4.2 Tasks**



Prioritize Projects - Process Model - Page 2 **Links to sections: 4.1 Roles and 4.2 Tasks**



4. Process Description

4.1 Roles

14. The process identified the following roles:

Table 4-1 | List of Roles

Role **(link to process model)**	**Role Description**
Idea Submitter	A person who submits ideas on behalf of their business unit, proposing new opportunities, problems, or needs for evaluation and appropriate routing.
Sponsor	A person who champions the project, secures resources, provides strategic guidance, and is accountable for delivering the expected business value.
Prioritization Screening Team (PST)	A cross-functional group of employees from Corporate Services, potentially including Procure to Pay, Business Architecture and Analysis, Solution Design, Change Delivery, Finance, and the Enterprise Project Management Office, responsible for reviewing submitted ideas and providing recommendations.
Enterprise Portfolio & Planning Council (EPPC)	EPPC includes representation for each business unit except for Internal Audit. EPPC members and alternates are identified by each of the business unit leaders.
Enterprise Project Management Office (EPMO)	EPMO is the organizational unit of the IESO responsible for fostering corporate excellence and governance in project management and for providing project management and project support services.
Executive Leadership Team (ELT)	The senior management body composed of the Chief Executive Officer (CEO), Vice Presidents (VPs), and other designated executive roles at Band 5 or higher. This group provides strategic direction, makes enterprise-level decisions, and oversees organizational performance.
Process Steward	The Process Steward is the person with the skills and experience to manage the day-to-day functions of a process, including monitoring process continuous improvement activities.

Role (link to process model)	**Role Description**
IT Solution	IT solutions are information technology maintained by Information and Technology Services (I&TS) at the IESO. IT solutions may support and perform work in a business process, including process continuous improvement, as per the performance reporting schedule.

4.2 Tasks

15. The process identified the following tasks:

Table 4-2 | List of Tasks

Task (link to process model)	**Responsible Role**	**Task Description**
Submit idea	Idea Submitter	An idea submission is recorded in the intake process with information describing the potential initiative so that it can be evaluated.
Review idea	Prioritization Screening Team	Ideas are evaluated to determine readiness for portfolio consideration, need for discovery or refinement, or ineligibility for portfolio consideration.
Prepare idea recommendation package	Project Management Office	A structured idea recommendation package is prepared consolidating all evaluation results for EPPC review.
Review idea recommendation	Enterprise Portfolio & Planning Council	A governance decision is produced indicating which ideas are approved to proceed to proposal development, which are deferred for future consideration, and which are rejected.
Communicate idea review outputs	Enterprise Project Management Office	The outcomes of the EPPC's decision are communicated to relevant stakeholders. Authorization is conveyed for sponsors to proceed with proposal development where ideas have been approved.
Submit business case for proposed project	Sponsor	A business case describing the justification and supporting rationale for the proposed project is submitted.

Task (link to process model)	**Responsible Role**	**Task Description**
Submit funding case for proposed project	Sponsor	A funding case describing the financial requirements of the proposed project is submitted.
Prepare proposed project package	Enterprise Project Management Office	A proposed project package is prepared consolidating the business case, funding case, and related proposal information so that proposed projects can be reviewed by EPPC.
Review proposed project	Enterprise Portfolio & Planning Council	A governance decision is produced identifying proposed projects that are approved to proceed for portfolio consideration, deferred for later review, or rejected.
Prepare portfolio recommendation package	Enterprise Project Management Office	A portfolio recommendation package is prepared that presents proposed projects and the recommended portfolio composition for EPPC review.
Review portfolio recommendation	Enterprise Portfolio & Planning Council	A portfolio review decision is produced indicating whether the portfolio recommendation is endorsed, requires revision, or should be escalated for ELT approval.
Finalize portfolio recommendation package	Enterprise Project Management Office	The portfolio recommendation package is updated and finalized based on EPPC direction and prepared for executive approval when required.
Approve project portfolio	Executive Leadership Team	An approved project portfolio is established through executive decision confirming the set of initiatives that will proceed.
Communicate approved project portfolio	Enterprise Project Management Office	The approved portfolio and resulting decisions are communicated to stakeholders to ensure visibility of portfolio outcomes.

Task (link to process model)	**Responsible Role**	**Task Description**
Maintain pre-portfolio backlog	Enterprise Project Management Office	The pre-portfolio backlog is maintained and updated to reflect ideas and proposals that are not currently included in the active portfolio but remain available for future consideration.
Fulfill reporting obligation	Enterprise Project Management Office	Reports are produced to provide visibility into the status and composition of ideas, proposed projects, pre-portfolio items, and the approved portfolio.
Issue process performance reports	IT Solution	Reports are produced to measure the quality, scope, time, and cost performance of the process.
Issue action items	Process Steward	Issues to be addressed are identified and action items are assigned for further analysis and resolution.
Complete action items	Process Steward	Assigned action items are completed.

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5. Process Risks, Controls, Service Levels and KPIs

5.1 Risks and Controls

16. The table below identifies the risks and controls where the Unmitigated Risk Level is 'Medium' or higher:

Table 5-1 | Risks and Controls

Risk	**Control**	**Control Task** (where the controls are implemented)
Risk 1: An idea is submitted with incomplete or inaccurate information.	**Control 1**: Standardized idea submission template and guidance.	Submit idea
	Control 2: PST conducts review of submitted ideas to validate completeness, check for accuracy, and request clarifications or corrections when needed.	Review idea
	Control 3: EPMO provides training and reference materials to help idea submitters understand expectations.	
Risk 2: An idea is assigned an inappropriate screening recommendation.	**Control 4**: Standardized idea screening guidance with defined evaluation criteria.	Review idea
	Control 5: EPPC reviews the screening recommendation.	Review idea recommendation
Risk 3: A decision on whether an idea should advance is made using incomplete information or inconsistent evaluation criteria.	**Control 6**: Ensure sufficient context and supporting information are provided for EPPC review.	Prepare idea recommendation package
	Control 7: Standardized idea review guidance with defined evaluation criteria.	Review idea recommendation
Risk 4: A business case is submitted with unrealistic assumptions or overstated benefits.	**Control 8**: Standardized business case submission template and guidance.	Submit business case for proposed project

Risk	**Control**	**Control Task** (where the controls are implemented)
	Control 9: EPPC review the proposed project.	Review proposed project
	Control 10: EPMO provides business case submission training and reference materials to help sponsors understand expectations.	
Risk 5: A funding case is submitted with underestimated or inaccurate funding requirements	**Control 11**: Standardized funding case submission template and guidance.	Submit funding case for proposed project
	Control 12: EPPC review the proposed project.	Review proposed project
	Control 13: EPMO provides funding case submission training and reference materials to help sponsors understand expectations.	
Risk 6: A decision on whether a proposed project should advance is made using incomplete information or inconsistent evaluation criteria.	**Control 14**: Ensure sufficient context and supporting information are provided for EPPC review.	Prepare proposed project package
	Control 15: Standardized proposed project review guidance with defined evaluation criteria.	Review proposed project
Risk 7: A recommended project portfolio is inconsistent with organizational strategy, capacity, or funding constrains.	**Control 10**: ELT reviews the project portfolio recommendation.	Approve project portfolio

5.2 Service Levels

17. Service levels describe characteristics of the process, which need to be met for this process to be considered a success.

    a. Service Level 1 (Mandatory): N/A

b. Service Level 2 (Guideline): N/A

5.3 Key Performance Indicators (KPIs)

5.3.1 KPI Name

18. Purpose: N/A
19. Means of Measure: N/A
20. Frequency: N/A

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Glossary

Word, Phrase or Acronym	Definition
Business Case	A document that explains the rational, expected benefits, and justification for undertaking a proposed project.
Fast-Track Project	A project requiring expedited consideration and decision-making due to urgent operational, regulatory, or strategic needs.
Formal Project	A project that meets any of the following criteria: • Involves more than one business unit and any one of the participating business units insists upon the use of formal project management methodology, or • Requires six person months or more of labour, or • Requires external spending of $50k or more.
Funding Case	A document that identifies the financial resources required to execute a proposed project and the associated funding profile.
Idea	A proposed initiative submitted for consideration that has not yet been developed into a proposed project.
Pre-portfolio Backlog	A list of ideas or proposals that are not currently included in the active portfolio but remain available for further consideration.
Project	A planned endeavour, usually with a specific goal and accomplished in several steps or stages. Unlike operations which are ongoing and repetitive, a project ends when its specific objectives have been obtained, or the project has been cancelled. A project has defined business objectives expressed in the SMART form.
Project Proposal	An initiative that has progressed beyond the idea stage and has supporting proposal documentation prepared for governance review.
SMART Objective	A formal statement of a business objective. SMART is an acronym which stands for the following: Specific, Measurable, Achievable, Realistic, and Time bound. The purpose is to create a statement which sets a direction while at the same time is concrete and prescriptive.

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