

# Gated Funding Kickoff Meeting

## Background

The Information Technology Project Assessment (ITPA) initiates a Gated Funding kickoff meeting. Once the ITPA is submitted, the Office of the Chief Information Officer (OCIO) will respond within a week to schedule the kickoff.

## Purpose of kickoff meeting

The purpose of the Gated Funding kickoff is to share specifics of your agency project and to gather project participants together to make sure expectations are clear. The objective is to review all required elements (per Section 719, or 701 of the 2019-2021 biennial budget) and discuss how to get started on the process.

The kickoff meeting should include the following participants:

- Agency project sponsor: Executive sponsor and business sponsor or representatives
- Agency project manager
- Agency chief information officer or information technology (IT) lead
- Agency financial team
- Office of Financial Management (OFM) budget analyst
- OCIO oversight consultant
- OCIO technology business management (TBM) consultant
- OCIO enterprise architect
- Department of Enterprise Services liaison

## Required kickoff meeting documents

In preparation for the kickoff meeting, the project will be asked to complete and send to the OCIO:

- For a new project, the Concept Briefing document
- For projects underway, a draft amended Investment Plan
- A draft of the Technology Budget

At the meeting, the OCIO will provide the following materials:

- The agency project ITPA
- The agency project Concept Briefing document
- The Gated Funding process document

## Kickoff meeting topics

During a kickoff meeting, the following topics will be reviewed:

**Concept Briefing document:** The agency will review the Concept Briefing document so all parties understand the scope, schedule, budget and business objectives for the project. Projects often have an approved charter to share at this time.

**Gated Funding process:** The OCIO team will present the Gated Funding process:

- Tactical, near term activities
- Project duration expectations including:
  - Agency updates to financial actuals and how that happens
  - Readiness activities before each gate request – who does what?
  - What to do when there is a change to project scope, schedule or budget

**Draft Technology Budget:** Walk through and review draft Technology Budget

**Next Steps Checklist:** The OCIO will review the Next Steps Checklist with the team to make sure all participants know what to do next. This includes:

- Working with the agency to post updates to the OCIO IT Dashboard.
- Completion of the Technology Budget, including establishment of the gates, the spend plan, and the deliverables for the project.
- OCIO and OFM review and approval of the draft Technology Budget. Once approved, the OCIO will post the approved Technology Budget to the project IT dashboard.
- Agency application for planning gate funds. Upon approval of the Technology Budget, the agency can request planning funds through the OCIO.
- Agency procurement of external quality assurance (QA) to initiate the QA Readiness Assessment.
- Agency requests Investment Plan approval. The agency should begin work on the Investment Plan. Projects will work with the assigned OCIO oversight consultant who will review and provide feedback.
  - When the quality assurance (QA) Readiness Assessment is complete, it becomes an appendix of the Investment Plan. The Investment Plan needs to address areas identified in the readiness assessment that need attention to support project success.
- Project initiation activities include:
  - Engage a qualified project manager
  - Hire qualified QA provider
  - Establish executive steering committee meetings (which include the OCIO, QA and an invitation to OFM)