

# **Transform the Portfolio Intake Process**

## **BRT/IBC/ITSP**

### **Modules**

<b>BRT/ITSP COURSE MODULES</b>				
<b>PILOT 1 TIME</b>	<b>COURSE MODULE</b>	<b>AUDIENCE</b>	<b>DESCRIPTION</b>	<b>OBJECTIVES</b>
10 Minutes	Orientation (Lecture)	AITRs	Introduces Pilot participants to the trainers, lets them know where to find rest room and snack facilities, the break times, and the other logistics of the Pilot training session.	Provide the AITR participants with the "housekeeping" details so that they can begin the training without distractions.
30 Minutes	Agency ITSP	AITRs	Overview of Agency IT Strategic Planning Guidance	Provides a high level view of Agency ITSP for novice AITRs
10 Minutes	Introduction (Lecture)	AITRs	Explains the enterprise issues with the previous group of processes and how the new method resolves those issues.	Promote a common understanding of why these changes are being made. Solicit feedback on the clarity of the explanation.
10 to 15 Minutes.	Review ITSP/BRT Process Flow (chart)	AITRS	Provide an overall walkthrough of the ITSP processes using the BRT Process Flow chart	Provide a general overview of the ITSP processes; revisions
15 Minutes	ITSP, ITIM Pre-Select, Select and Control Phases Overview (Lecture)	AITRs	Provides Pilot participants with an overview of the Pre-Select, Select and Control Phases of ITIM and how AITR activities fit into the whole lifecycle.	Give the participants the "big picture" of how the ITIM Phases relates to AITR functions in the ITIM lifecycle.
15 Minutes	OR/I, BRt, BRnt, OR/I Scorecard, PPD Overview (Lecture)	AITRs	Provides Pilot participants with an introduction to ORI BRTs, OR/I Score Card and PPD in Pre-Select Phase in the CTP system	Explain OR/Is and agency ownership of BRTs. Include benefits to agency. Navigate to forms and have agencies view appropriate handouts
15 Minutes	PRCA, IBC, IBF, PBA and ITSP Overview (Lecture)	AITRs	Provides Pilot participants with an introduction to PRCA, IBC, IBF and ITSP in the CTP system	Explain Select Phase forms. Describe move of ITSPs from VA Performs to CTP system.
5 Minutes	PGR Overview (Lecture)	AITRs	Provides Pilot participants with an introduction to PGR in the CTP system	Explain Control Phase form.
10 Minutes	AITR documentation of the OR/I Status Scorecard – walk-through (Lecture)	AITRs	Introduces the OR/I Status Scorecard. Explains the general rules for using the OR/I Status scorecard	Introduce AITRs to the OR/I Status process concept.
10 Minutes	AITR documentation of an OR/I – walk-through (Lecture)	AITRs	Introduces the tabs on the OR/I Form. Explains the general rules for creating new ORIs.	Introduce AITRs to the OR/I process concept. Provides a basic understanding of the make-up of an OR/I.

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20 minutes	AITR documentation of an OR/I – case study (Hands On)	AITRs	Provides Pilot participants an opportunity to respond to an OR/I entered in CTP by Governance staff.	Get AITRs familiar with the OR/I. Solicit feedback from Pilot participants on best methods for introducing OR/I to a larger audience.
10 minutes	AITR documentation of BRTs and BRnT – walk-through (Lecture)	AITRs	Introduces the two types of BRTs and the Business Requirements for Existing Technology form.	Get AITRs familiar with the BRT types and the BRnT form. Solicit feedback from Pilot participants on best methods for introducing BRTs and BRnT to a larger audience.
20 minutes	AITR documentation of BRnT –case study (Hands On)	AITRs	Provides Pilot participants an opportunity to create a BRnT	Get AITRs familiar with creating BRnT. Solicit feedback from Pilot participants on best methods for introducing BRnT to a larger audience.
10 minutes	AITR documentation of BRnT –walk-through (Lecture)	AITRs	Introduces the Business Requirements for New Technology form.	Get AITRs familiar with the BRnT form. Solicit feedback from Pilot participants on best methods for introducing BRTs and BRnT to a larger audience.
20 minutes	AITR documentation of BRnT –case study (Hands On)	AITRs	Provides Pilot participants an opportunity to create a BRnT.	Get AITRs familiar with creating BRnT. Solicit feedback from Pilot participants on best methods for introducing BRnT to a larger audience.
5 minutes	AITR and Agency Head approval of BRTs using the Approval Status – Strategic Planning BRTs Scorecard – case study (Hands On)	AITRs	Introduces the Approval Status – Strategic Planning BRTs Scorecard and shows how to identify un-approved BRTs and approve them if they are ready	Get AITRs familiar with the Approval Status – Strategic Planning BRTs Scorecard. Solicit feedback from Pilot participants on best methods for introducing BRTs to a larger audience.
10 Minutes	AITR documentation of PPD – walk-through (Lecture)	AITRs	Introduces the Project or Procurement Determination form. Explains step PMD will take to determine if an investment is a Project or Procurement.	Introduce AITRs to the PPD process concept. Provides a basic understanding of the make-up of a PPD.

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15 Minutes	AITR submission of a PRCA, IBC, IBF for Agency Head approval and inclusion in the ITSP – walk-through (Lecture)	AITRs	Introduces the tabs on the PRCA, IBC and IBF Forms. Explains the general rules for creating new PRCA, IBC and IBFs.	Introduce AITRs to the revised PRCA, IBC and IBF process concepts. Provides a basic understanding of the make-up of a PRCA, IBC and IBF, and their places in the ITSP process.
20 Minutes	AITR submission of a PRCA, IBC, IBF for Agency Head approval and inclusion in the ITSP – case study (Hands On)	AITRs	Provides Pilot participants an opportunity to enter a PRCA, IBC and IBF into CTP based on case study BRTs	Get AITRs familiar with the new PRCA, IBC, and IBF. Solicit feedback from Pilot participants on best methods for introducing PRCA, IBC and IBFs to a larger audience.
15 Minutes	AITR submission of a PBA and PGR for Agency Head approval and inclusion in the ITSP – walk-through (Lecture)	AITRs	Introduces the tabs on the PBA and PGR forms. Explains the general rules for creating new PBAs and PGRs.	Introduce AITRs to the PBA and PGR process concepts. Provides a basic understanding of the make-up of a PBA and PGR and their place in the ITSP process.
40 Minutes	AITR submission of an PBA (Select) and PGR (Control) for Agency Head approval and inclusion in the ITSP – case study (Hands On)	AITRs	Provides Pilot participants an opportunity to enter a PBA and PGR into CTP based on case study BRTs.	Get AITRs familiar with the new PBA and PGR form. Solicit feedback from Pilot participants on best methods for introducing PBAs and PGRs to a larger audience.
30 minutes	AITR and Agency Head submission of ITSP for CIO of the Commonwealth approval – walk-through (Lecture)	AITRs	Introduces the tabs on the ITSP Form. Explains the context for the ITSP, the pre-ITSP work recommended in the AITR ROLE PROCESS, and the general rules for creating ITSPs.	Introduce AITRs to the revised ITSP process. Provides a basic understanding of the make-up of the revised ITSP.
30 minutes	Agency Planning	AITRs	ITSP - What to put in and how to develop it	
1 hour	AITR and Agency Head submission of ITSP for CIO of the Commonwealth approval – case study (Hands On)	AITRs	Provides Pilot participants an opportunity to enter an ITSP into CTP based on case study BRTs and the Pilot IBC entry.	Get AITRs familiar with the new ITSP. Solicit feedback from Pilot participants on best methods for introducing revised ITSPs to a larger audience.