Privacy & Information Management Taskforce

P R O J E C T C H A R T E R	
Project Name	**Privacy and Information Management Task Force Project**
Author(s) of Charter	PIMT Steering committee (list at the end of Charter)
Date	May 15, 2007

Description

The PIMT project will result in the development of resources, frameworks and guidelines to help all Ontario school boards and authorities guide their information access and protection of personal privacy practices. Frameworks being considered include, but are not limited to privacy standards, information management standards and privacy impact assessment guidelines.

Purpose-Addressing Urgent Needs

The information management and privacy landscape in the education sector has changed; emerging approaches to electronic information management, such as data warehousing and central data bases have the potential to erode staff and students' privacy rights. School boards and authorities are struggling to understand how information and privacy legislation affects their management of educational data, and a number of initiatives such as MiSA and OnSIS have heightened the urgency to address these concerns. The challenge is to ensure the appropriate and ethical use of data and personal information; the application of information access and protection of privacy legislation; and the management of the organizations information assets, while meeting the operational needs of school boards and authorities. This requires strategic and proactive efforts to promote awareness and develop and implement a set of standards around privacy protection and information management.

Project Benefits

All Ontario School Boards -- large, small, public, Catholic, English, French and school authorities -- will benefit from this project. The deliverables will support all levels of operations: strategic, clerical, academic, technical and legal. Students, parents and board employees will ultimately have assurance that their sensitive personal information will be handled in accordance with the relevant statutes. The project outcomes will also strengthen the capacity of school boards and authorities in responding to information audits and other risk evaluation processes and enable efficiencies and economies of scale to be achieved and the opportunities to collaborate and share resources, knowledge and expertise.

Project Sponsor (Governance)

Privacy and Information Management leadership is needed in the Ontario education sector to guide province-wide efforts such as this project, to champion the development of the project deliverables and to fund the project's complete scope.

Project Sponsors: The project is funded OASBO and the MiSA Professional Network Centres. CODE (the Council of Ontario Directors of Education) and COSBO (Council of Senior Business Officials) will champion and support the project. Letters of support will be solicited from both groups.

Steering: The PIMT steering committee represents:
All Ontario School Boards/School Authorities: large, small, public, Catholic, French; Educational associations: OASBO (Ontario Association of School Business Officials), MISA (Managing Information for Student Achievement) /GIARE Gestion de l'Information sur l'Amélioration du Rendement des Élèves), OPSOA (Ontario Public Supervisory Officers Association), AERO (Association of Educational Researchers of Ontario).

Approval: The members of PIMT steering committee will approve the Charter by signing it. The approval and membership list is included with the Charter.

The steering committee will execute the project and will report the progress to the project sponsors. Any scope change or milestone modifications will be presented by the steering committee to the project sponsor

Working Level: Board staff and participants on the PIMT steering committee; workgroups with at least one member of the PIMT steering committee.

Success Criteria

The success of the project will be enhanced by the support of all Directors' and Senior Business Officials.

The success of the project is contingent on:
- sustained funding
- in-kind contributions

The project's success will ultimately be reflected through culture changes in information access, management and protection of privacy practices in the Education sector.

Indicators of Success

The development and distribution of resources, frameworks and guidelines to school boards and authorities within the established timelines will be a success indicator.

Scope (Objectives and Deliverables)

The project scope includes:

- Frameworks and guidelines applicable to all 72 school boards and provincial school authorities;
- Information gathering of data applicable to information management, privacy and access to information legislation;
- Consultation with other similar organizations; canvass of provincial, public and to the extent applicable, private sector tools and frameworks;
- Consultation with Board staff: Information Technology, Information/Records Management, Freedom of Information, Human Resources, teachers, principals, school operations staff and school board administration, researchers, special education, student success, support staff;
- Privacy and Security Standards, Privacy Impact Assessment (PIA) Tools, Information Management (IM) Strategies and Best Practices and Training and Professional Development Strategies that all boards can adopt will be developed;
- Tools: training and professional development—one set per board.

Upon approval, the project will start on March 19th and close at the end of June 2008.

Out of Scope

The following are not included in the project;

- delivery of training to school boards and final users (this may be covered in the future phase using the train the trainer approach);
- follow up on training adjustments, on going professional adjustment after completion of phase 3;
- phase 4, resources are planned for closure process but resources do not include operational effort after June 2008;
- customized policies or adapting deliverables for individual school boards or schools.

People and Organization Change Impacts

School boards and authorities may consider organizational changes that will help support the necessary changes in core values, standards, business processes, policies, procedures, technology and finances as a result of this project. There are security levels or protection of privacy implications that need to be addressed as a part of the project. Protection of privacy, security and appropriate access will become the new norm.

Other Related Projects and Initiatives

Projects and initiatives currently underway that can be leveraged to support project deliverables will be identified and integrated.

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Milestones and Timelines

The descriptions and timelines for the deliverables will be included in the project plan. The taskforce will function as a steering committee, will set parameters, target dates and guidelines for each workgroup are based on the following premises:

- School Boards/Authorities need early deliverables for immediate usage, preferably starting in June 2007
- All deliverables will be produced during the school year 2007-2008
- The project will end in June 2008.The workgroup guidelines will establish a framework for the deliverables of each workgroup.

Any modifications to the deliverables must be reported to and approved by the PIMT steering committee.

Phases	Deliverable
Build project plan delivery and approval of project plan	project plan
Project Kick off	communication plan
Information Gathering a) Legislation b) Other similar organisation practices c) Review of District School Boards-Authorities existing policies and procedures	 report document report document report document
Establish the Workgroups The workgroups will be Co-Chaired by steering committee members (one of which will be an FOI/RM rep). Workgroups will include cross disciplinary representation. Open invitation to staff from all School Boards-authorities to apply.	privacy and security standards documents PIA IM strategies & Best Practices guidelines & documentation PD Strategies and documentation
Project Closure Phase – becomes operational	Maintenance Strategies & Closure Documents
Future Phase: Knowledge Transfer and Training	Subject to resources and interest

Resourcing/Person Days (PD) Needed (Estimate)

Position	Project Responsibilities	plan	Info Phase 1	Build Phase 2	Prof. Dev Phase 3	Closure & Operation Phase 4	Total
PIMT sub committee	Project delivery approval and validation	6	2	2	5	15	25
FOI experts, internal	Research, validation, development		27	165	90	3	195
FOI experts, external	Validation		15	85	25	3	103
Research expert, internal	Research, validation, development		20	70	30	3	93
IT & Business, internal	Research, validation, development		27	135	75	3	165
Legal advisor	Validation		5	15		1	21
Project Manager	Project management, validation, development	10	7	25	30	3	45
MISA leaders	Research, validation, development		14	100	50	7	121
Writing and Clerical	Report writing & deliverable		9	90	75	5	104
TOTAL PDs:		16	126	687	380	43	872
material	Documentation, material (tools), meetings	1 500	5 000	15 000	50 000	5 000	26 500

Project Budget (Estimate)

Resource	Daily rate	person days	
FOI experts, external	1400	128	179 200
Legal advisor	1400	21	29 400
Writing and Clerical	250	203	50 750
Sub total			259 350
Material			76 500
Total:			**$ 335 850**

Project Risk Identification

- Insufficient or lack of funding may jeopardise the delivery of key phases of the project and deliverable.
- Lack of involvement of certain stakeholder groups can reduce the quality and completeness of the project.
- Weak or un-sustained endorsement of the project by the sponsors can affect the full delivery of the project.
- Inadequate closure of the project will weaken continued efforts after 2008.
- Major changes in the environmental factors (e.g. regulatory, political, societal)

Charter Approved by Privacy and Information Management Taskforce Members

Position/Title

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