The BIR Project Management Manual



PROJECT MANAGEMENT MANUAL

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GLOSSARY

For purposes of this document, the following terms and definitions apply.

1. **Activity** is the identified component of work within a schedule required to complete a project.
2. **Baseline** is the reference basis for comparison against which project performance is monitored and controlled.
3. **Budget Management** refers to the authority of the project manager to commit, manage, and control project funds.
4. **Bureau** refers to the Bureau of Internal Revenue (BIR) as an agency.
5. **Business Case** is a document justifying the need to carry out the project, clearly articulating the benefits of successfully completing the project (e.g., revenue increase, cost reduction, etc.). Moreover, it addresses concerns related to possible financial and business-related risks.
6. **Champion** provides assistance in communicating and spearheading project changes in their respective offices for a common understanding of project objectives, immediately resolves issues identified in their offices, and escalates the matter to the project manager/team head as needed.
7. **Change Request** is documentation that defines a proposed alteration to the project.
8. **Conflict Resolution** defines how the project manager/team head can resolve conflict within the team, the organization, and external stakeholders.
9. **Control** refers to the comparison of actual performance with planned performance, analyzing variances, and taking appropriate action or intervention to achieve the desired goal.
10. **Executive Sponsor** refers to the top management who provides overall directions in formulating, executing, and implementing programs and projects. Roles include reviewing progress, committing funding & resources, and clearing roadblocks.
11. **Institutionalization** is an ongoing process in which activities, structures, and values become an integral and sustainable part of an organization.
12. **Preventive Action** is the direction and activity for modifying the work in order to avoid or reduce potential deviations in performance from the plan.
13. **Program** is a collection of related projects that contribute to an outcome or a larger organizational goal.
14. **Program Integrator** is also called program coordinating office, project management office work within the program management particularly on planning, organizing, monitoring and controlling large scale programs, comprising multiple related projects in support of the government program management.
15. **Program Lead** also refers to project sponsor, functional owner, process owner, and/or project proponent. Maybe a high-ranking official (or office) in the organization who

serves as the overall overseer of the project, providing overall direction and is accountable for the various projects under their respective functional services across the organization.

16. **Project Conceptual Plan** is the agency's abridged version of a Project Charter. Hence, it is equivalent to a high-level Project Charter. It identifies the necessary project details, such as the scope and estimated cost/budget, and ensures that everyone involved in the project is aware of its purpose.

17. **Project Life Cycle** is a series of phases that a project passes through from initiation to its closure.

18. **Project Team Head** is the person or office with authority with regard to staffing, budget management and variance, technical decisions, and conflict resolution. Role includes bringing the right people on board the project, organizing the team to meet regularly, communicating progress and challenges to key stakeholders, identifying potential problems and mitigating risks, and obtaining approval of project management plan.

19. **Project Team Members** are created under a Revenue Special Order (RSO) responsible for executing the tasks to reach the milestones and deliver the products or services expected from the project.

20. **Resource** is anything needed to execute a task or a project (e.g., skill sets of employees, adoption of software, etc.).

21. **Risk Register** is the record of identified risks, including analysis and planned responses.

22. **Stakeholder** is a person, group, or organization that has interests in, or can affect, be affected by, or perceive itself to be affected by, any aspect of the project. May include Program Leads/Project Heads or the like.

23. **Steering Committee** includes the executive sponsors and key stakeholders, acting as an advisory group in providing guidance on the key decisions for the project implementation.

24. **Technical Decisions** describe the authority of the project manager/team head to make technical decisions about deliverables or the project approach.

25. **Variance** refers to the variance level that requires escalation.



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MESSAGE FROM THE COMMISSIONER OF INTERNAL REVENUE

Congratulations are in order for the dedicated men and women of the Project Management and Implementation Service (PMIS) and its two (2) attached divisions, namely, the Project Development and Management Division (PDMD) and the Project Monitoring and Evaluation Division (PMED), for coming up with the BIR Project Management Manual.

Project management is crucial in ensuring that project objectives are closely aligned with the strategic objectives of our agency, as well as in assuring that goals are attained and targets are delivered within the established and agreed schedule. Effective project management also safeguards the loss or wastage of public resources, which we are mandated to expend judiciously. As such, its importance in promoting good governance and stewardship, particularly in tax administration, cannot be undermined. Compiling then the various relevant thoughts in project management into a manual is a commendable effort.

The BIR Project Management Manual serves a vital source of information and expertise specially for project managers and implementers as it contains some of the basic and generally accepted concepts, principles, tools, and guidelines in project management. As such, this is a fitting and must-have resource for our Digital Transformation (DX) Implementation Team members, who are currently spearheading the Bureau's intricate but challenging journey towards digital transformation.

I also encourage every official and employee of the Bureau to include this document as part of their learning resources and compilations.



Caesar R. Dulay
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