

# Budget Instructions

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## Information Resources Management

January 2008  
CIO Council Presentation

# Agency IT Budget Instructions

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## ■ Requirements (All Agencies)

- IT Project list for projects >\$150,000 (POP or Base)
  - Form (107BF14)
- “Major” IT Projects >\$1,000,000 (POP or Base)
  - Form (107BF14)
  - Business Case Document
- Establish standard lifecycles for agency IT assets and develop and submit lifecycle replacement plans
  - Required by State IT Asset Inventory and Management Policy
  - Sample plans to be provided on request

**Note:** Helps fulfill agency and DAS IT Portfolio Management-related statutory obligations (ORS 184.473-184.477)

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# Agency IT Budget Instructions

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## ■ Requirements (SDC Customer Agencies)

State Data Center (SDC) customer agencies must request SDC involvement in the planning and budget development for Information Technology projects.

- 5/1/08: Consumer and Business Services, Employment, Housing and Community Services, and Veterans Affairs - Response with pricing information will be provided back to agency by 6/1/08. Transportation and Human Services - Response with pricing information will be provided back to agency by 7/15/08.
- 6/1/08: Administrative Services, Corrections, Forestry, Revenue, and State Police. Response with pricing information will be provided back to agency by 7/15/08.

Process designed to:

- Improve quality of SDC customer agency IT project planning
- Increase accuracy of SDC-related cost estimates
- Ensure SDC infrastructure capacity, budget and resources will be sufficient to meet agency needs in 09-11 and beyond

For more information, contact Kurtis Danka, SDC Chief Technical Architect at 503-373-2043

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# IT Project List – Form 107BF14

## INFORMATION TECHNOLOGY PROJECTS IN 2009-11 - DRAFT

(THAT EQUAL OR EXCEED \$150,000)

Agency Name:			
Project Name:			
Mandated Project?	Yes or No		By: Legislature, Federal Gov, Other (identify it)
Base Budget or POP?			Which agency or state plans or goals does it align with and/or support?
State Data Center Impact	Yes or No		

Project Description:							
Cost Summary							
Total estimated cost by fund (09-11):	General Fund	Lottery Funds	Other Funds	Non-Limited	Federal Funds	Non-Limited	Total Funds
	\$	\$	\$	\$	\$	\$	\$
Total estimated cost by fund (all biennia):	\$	\$	\$	\$	\$	\$	\$
Estimated Cost by category (09-11):	Personal Services	Services & Supplies	Capital Outlay	Special Payments	Debt Service		
	\$	\$	\$	\$	\$	\$	\$
Estimated Cost by category (all biennia):	\$	\$	\$	\$	\$	\$	\$

State Data Center Cost Estimate:	
Expected Start Date:	
Expected Completion Date:	

Positions:	
Internal/	
Contractor	
FTE:	

Agency Request     
  Governor's Recommended     
  Legislatively Adopted     
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# Major IT Projects – Business Case

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- For all Major IT Projects (POP or BASE  $\geq$  \$1M) agencies must submit a business case document that clearly describes how the project/initiative:
  - Aligns with and supports agency strategic/business plans
  - Aligns with and support the Governor's goals, priorities and initiatives, the 2007-11 Enterprise Information Resources Management Strategy, and other IT-related statewide plans, initiatives, goals and objectives.
- The business case should also include the following information:
  - Subject, Purpose & Scope
  - Projected cash flows across timeline (lifecycle or other)
  - Alternatives Analysis (to the extent possible at this point in the project lifecycle)
  - Assumptions & Methods that the investment is based on
  - Costs & benefits – Financial & Non-financial (to the extent possible at this point in the project lifecycle)
  - Critical Success Factors
  - Risk Assessment (to the extent possible at this point in the project lifecycle)
- A sample business case template can be found at: <INSERT EISPD/ITIP URL>
- For questions or assistance, contact Sean McSpaden - 503-378-5257

# Appendix D – IRM Supplement

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- **Guidance/Recommendation (Appendix D)**
  - Develop an IRM Plan prior to Agency Request Budget Submission
    - Will help justify projects the agency plans to pursue
    - Will improve understanding of how planned projects support achievement of state and agency business goals and strategies
    - Detail provided in Appendix D – IRM Supplement
    - **Note: IRM Plan is recommended but is **NOT required****
  - Select and track IT Performance Measures
    - Endorsed by the State CIO Council in 2005
    - Detail provided at:  
[http://www.oregon.gov/DAS/EISPD/ITIP/Comm\\_of\\_Practice\\_ITPM.shtml](http://www.oregon.gov/DAS/EISPD/ITIP/Comm_of_Practice_ITPM.shtml)

# Special Approvals

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- Special approval required for proposed acquisition or modification of
  - Geospatial Information Systems
  - Administrative Information Systems
  - Email systems
  - Help Desk Systems
  - IT Asset Management Systems
  - Electronic Records Management, Document Management and Imaging Systems
  - Licensing Systems
- Agencies to submit requests to EISPD by June 30, 2008

For questions or assistance, contact Sean McSpaden - 503-378-5257

# Enterprise Information Strategy and Policy Division

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## State Chief Information Officer

- Dugan Petty, State CIO
- Angela Skyberg, Executive Assistant – 503-378-3175 (Main #)

## IT Investment and Planning

- Sean McSpaden, Manager - 503-378-5257
- Charlene Wood, Executive Assistant – 503-378-8366
- Scott Riordan – 503-378-3385
- Darren Wellington – 503-378-2242

# DAS State Data Center

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## State Data Center Administrator

- Mark Reyer, State Data Center Administrator
- Julie Bozzi, Deputy State Data Center Administrator
- Kelley Cullison, Executive Assistant – 503-373-0396 (Main #)

## Plans and Controls

- Darin Rand, Manager - 503-378-3366
- Kurtis Danka, SDC Chief Technical Architect – 503-373-2043