

Agency IT Strategic Plan (ITSP)

Writing the Information Technology (IT) Strategic Plan is a collaborative effort between the business, finance, and IT leaders within the agency. It cannot be written without input and involvement from all parties. The resources responsible for preparing the agency strategic plan must provide input to those responsible for the agency's IT Strategic Plan (ITSP) to successfully write the plan. The primary resource responsible for preparing the IT Strategic Plan is the Agency Information Technology Resource (AITR).

The ITSP is the primary tool for communicating how agency business needs drive IT investment decisions, and how the agency's IT investments support the business goals and objectives of the agency and the commonwealth. The ITSP provides a detailed view of the *business value* of agency IT investments, identifies the alignment of each individual IT investment to the agency's service area objectives and performance measures, and provides additional information for each investment (i.e., costs, start and end dates, service area owner, etc.)

After all components of the agency ITSP have been approved or certified by the agency head, the ITSP must be submitted to the CIO of the Commonwealth for review and approval. The 2024-26 biennium ITSP is due to the CIO of the Commonwealth by June 30, 2023.

What is the Business Value of IT?

The Business Value of IT demonstrates how an IT investment contributes value of the following three value categories: improved constituent service levels, agency operational efficiencies, and the strategic goals of the agency and the commonwealth. IT investments may provide value in one, two or all three of these value categories. Investments can apply to more than one category.

Constituent Service

Constituent service is the measure of how well an IT investment helps the citizens of the commonwealth. This can include offering financial benefits such as lower cost of interaction with citizens, reduced fees, or quicker reimbursements. It can also include service improvements such as reduced wait times, improved access, and new services leading to constituent benefits, or a greater focus on constituent needs. The fulfillment of federal or state mandates is also considered a constituent service.

Examples of how an IT investment provides value to constituents are:

- improving customer experience
- reducing request/form processing times
- providing better access to information
- increasing ease of use
- adding new services
- meeting federal or state mandates
- increasing service quality

- reducing constituent-facing error rates
- reducing user fees
- enhancing public relations
- decreasing environmental impact

Operational Efficiency

Operational efficiency is the measure of an IT investment's capability to reduce agency operational and inventory costs or provide other financial benefits such as streamlined supply chains, new revenue streams, higher productivity, error reductions, faster merging of administrative processes, or an improvement in agency performance against Department of Planning and Budget (DPB) productivity measures.

Examples of how an IT investment provides operational efficiencies are:

- reducing ongoing operations and maintenance costs
- reducing personnel costs
- redeploying personnel to another task
- reducing error rates
- increasing production volume
- reducing material waste
- reducing raw material use
- reducing costs through a shared service
- reducing costs through an enterprise application

Strategic Alignment

Strategic alignment is the measure of an IT investment's support for commonwealth goals and objectives as expressed in the individual agency strategic plans, the Commonwealth of Virginia Strategic Plan for Information Technology, the Governor's initiatives, and the Commonwealth's Enterprise Architecture. It also includes the applicability of the investment across the enterprise.

Examples of an IT investment's strategic alignment are:

- improving performance in an *agency productivity measure*
- improving performance in an *agency administrative measure*
- improving performance in another *agency measure*
- participating with other agencies in a shared service solution
- participating with other agencies in an enterprise or collaborative solution
- incorporating enterprise data standards into the solution

Agency service area performance measures can be aligned with one of the IT investment value categories. In the performance-based budgeting model, each agency service area has at least one objective, and each objective has one or more performance measure. The impact of a proposed IT investment on service area performance should be identified for each investment discussed in the IT Summary section.

ITSP Components

The ITSP has five components:

1. IT Summary Section
2. IT Budget Estimation Tables
3. Business Requirements for Technologies (BRTs)
4. Agency IT Projects that align with Business Requirements for Technology
5. Agency IT Procurements that align with Business Requirements for Technology

These components, as part of the ITSP, are in the Commonwealth Technology Portfolio (CTP) application.

For a complete list of in-scope agency ITSP requirements and instructions for accessing ITSP components, please go to the IT Strategic Planning web page at

<https://www.vita.virginia.gov/it-governance/it-investment-management/it-strategic-planning>.

1. IT Summary Section of the Agency IT Strategic Plan

The purpose of the IT Summary Section of the agency strategic plan is to provide a business value perspective on the agency's information technology investments and to demonstrate how these investments support the goals and objectives of the agency and the commonwealth.

The agency should identify all business needs that, from the agency's perspective, can be supported by an enterprise or collaborative IT solution.

If the agency has any business requirements for new or existing technology, IT projects or procurements for the upcoming budget biennium documented in CTP, the agency must discuss how these business requirements and investments support the business environment. .

The IT Summary Section consists of three sections:

Current IT State

In this section, the agency will report whether its current IT investments are meeting the agency's business needs and strategies.

If the current IT investments are not meeting the agency's business needs, the agency will describe how each investment is not doing so and any existing IT that will be required to produce the desired business value. Include all enhancement opportunities, even those that are not funded at this time, and focus on the business value of improving the IT agency performance. In your discussion, be sure to note whether the proposed enhancements are funded or not. Each existing IT business requirement must have a corresponding Business Requirement for Existing Technology (BReT) entered into CTP.

Hypothetical generic example: *A service area is using an aging IT solution to manage a business process that refunds excess fee payments to citizens. The current IT solution has to be updated to match needed changes in the service area's operational processes. Use of the IT solution as-is results in delayed constituent receipt of refunds, decreased service quality, negative public relations, increased error rates requiring manual double checking and the reallocation of staff from other tasks to process handling. Subsequently, the aging of the IT solution has resulted in the service area not meeting its performance measure for the business process. The agency does not have funding for this solution update.*

If the agency's existing IT investments are meeting the agency's business needs and will not require enhancement in the foreseeable future, the agency should enter the following text rather than leave the *Current IT State* section blank:

At this time, the agency anticipates that all Current IT Investments will continue to meet agency business needs in the foreseeable future and will not need enhancement or additional investment.

Factors Impacting the Current IT

In this section, the agency will describe the changes in their business environment that will require or mandate changes to the agency's current business requirements or IT investments. These are requirements and mandates from external sources, such as other agencies or business partners, the agency's customer base, product and service providers, or new federal or state legislation or regulations. The agency must identify the business reason for the change, any important deadlines that must be met, and the consequences if the deadlines are not met. In your discussion, be sure to note whether the proposed enhancements are funded or not. Each requirement or mandate from an external source must have a corresponding Business Requirement for New Technology (BRnT) or BReT entered into CTP.

Hypothetical generic example: *The federal government has established a performance standard and review schedule for a service provided by an agency, and the federal standard is a key performance measure for the agency. In order to meet the new performance standard, the service area has identified a number of business processes that will have to be improved. In the service area's estimation, the current technology that supports these processes will not be able to accommodate the business process changes and will have to be modified. The agency will be required to meet the federal performance standard. The agency has received a grant from the federal government that will fully fund a replacement information management system.*

If the agency's existing current IT investments will not need enhancement due to requirements or mandates from external sources in the foreseeable future, the agency should enter the following text rather than leave the *Factors Impacting the Current IT* section blank:

At this time, the agency is not aware of any external factors, requirements or mandates that will require IT investments by the agency in the foreseeable future.

Proposed IT Solutions

In this section, the agency will discuss the business value of proposed IT solutions or investments that support agency strategic objectives, service area strategic objectives, commonwealth, enterprise, or secretariat-level strategic priorities, agency performance

measures and/or societal indicators. This section must discuss the business value of any agency IT investments for the upcoming budget biennium. In your discussion, be sure to note whether the proposed solutions are funded or not. Each requirement must have a corresponding BRnT entered into CTP.

Hypothetical generic example: *Management of the commercial use of natural resources is an agency strategic objective. In coordination with other commonwealth agencies, the agency is planning to lead a partnership consisting of several states and the federal government that will initiate an ongoing program to manage commercial use of natural resources in a multi-state region. The goal of the partnership is to restore resources that have been depleted by over-use and assist in the rebuilding of industries that use the resources. In coordination with the partners, the agency plans to implement and maintain a shared partnership activity development, monitoring, and reporting application that will support research into methods for sustainable commercial resource use, improvement of overall resource quality, restoration of damaged resources, and the protection of commercial interests while the broader quality issues are pursued. The agency will budget funding for its portion of the shared application's development and maintenance costs.*

If the agency does not have any Proposed IT Investments, the agency should enter the following text rather than leave the *Proposed IT Solutions* section blank:

At this time, the agency does not have any Proposed IT Solutions or investments that will support agency strategic objectives, service area strategic objectives, commonwealth, enterprise, or secretariat-level strategic priorities, agency performance measures, or societal indicators.

2. IT Budget Estimation Tables

Agencies will use the IT Budget Estimation Tables to define the estimated cost of agency IT investments for the upcoming biennium. Agencies must look across all their service areas and programs to identify all IT investment costs for the previous year, and use the previous year's costs, in addition to the base budget for all IT expenditures provided by DPB, as the basis for estimating the future agency-wide IT budget.

All in-scope agencies must fill out the Current IT Services and Proposed IT Investments tables in CTP, using the instructions below, prior to submitting the agency ITSP for CIO review and approval.

Current IT Services Table

Current IT Services represent the costs of ongoing IT operations and maintenance. Items in this category cover estimated costs for the entire next biennium. These items do not need project or procurement review and approval. A solution request for infrastructure is considered an operations and maintenance expense and is included in Current IT Services table if it is less than \$250,000. Solutions requests equal to or greater than \$250,000 are under commonwealth oversight and governance and will be documented as a commonwealth investment in CTP. Solution requests that support IT projects are included in the appropriate project cost row in the Proposed IT Investments table.

Current IT Services				
Category	Costs Year 1		Costs Year 2	
	General Fund	Non-general Fund	General Fund	Non-general Fund
Projected Service Fees	Pre-populated	Pre-populated	Pre-populated	Pre-populated
VITA Infrastructure Changes				
Estimated VITA Infrastructure	Total of rows 1 and 2	Total of rows 1 and 2	Total of rows 1 and 2	Total of rows 1 and 2
Specialized Infrastructure				
Agency IT Staff				
Non-agency IT Staff				
Cloud Computing Services				
Other Application Costs				
Total	Total of rows 3 through 8	Total of rows 3 through 8	Total of rows 3 through 8	Total of rows 3 through 8
Comments				

Projected VITA Service Fees

VITA will provide each agency with its projected service fees by pre-filling the ‘Projected Service Fees’ row in the table above. The projection is equal to the agency’s most recent base service fees plus 3%. Agencies will use the projection as a basis for estimating service fees in the upcoming biennium.

VITA Infrastructure Changes

If the agency expects VITA Infrastructure costs to increase or decrease during the upcoming biennium, the amount of change in VITA Infrastructure costs should be entered in the VITA Infrastructure Changes row.

Estimated VITA Infrastructure

Estimate VITA infrastructure costs including all networking, hardware, data storage, mainframes, telecommunications, project and procurement oversight services, and any other equipment and services provided by VITA. This row is a subtotal of the previous year’s VITA infrastructure and VITA Infrastructure Changes row.

Specialized Infrastructure

Estimate the agency’s specialized infrastructure costs including all networking, hardware, data storage, mainframes, telecommunications, and information technology equipment **not** provided by VITA. This includes the infrastructure portion of fees paid to application service providers and infrastructure services that may be included in building rental and lease agreements. If the agency expects specialized infrastructure costs to increase or decrease during the upcoming biennium the change in specialized infrastructure costs should be reflected in the estimate the agency provides in the Current IT Services table.

Agency IT Staff

The estimated agency IT staff cost should be based on the agency IT staff cost for the previous year, then adjusted based on anticipated increases or decreases in staffing. Do not include the cost of non-agency IT staff that will be acquired through a staff augmentation contract, the cost of staff that will be borrowed from another agency, or the cost of staff that will be assigned to an IT project in this estimate. To estimate the agency IT staff cost for the previous year, please use the following process:

Estimating the Agency IT Staff Cost for the Previous Year		
Step	Action	Cost
1	Total salary costs for all personnel classified as IT for the previous year. Do not include the salary for personnel loaned to another agency if that agency is paying reimbursing your agency for the salary cost. Subtract any salary paid to staff for work done as a part of an agency IT Project, per project, and keep that total for use in the Proposed IT Investments table.	
2	Identify all non-IT classified personnel (including managers, administrative staff, data entry staff doing application support, etc.) who did IT work during the previous year and the percentage of time they spent doing IT work during the previous year. For each non-IT classified person identified, calculate salary costs by multiplying non-IT classified personnel salary by percentage of time spent doing IT work, then adding all costs together. Subtract any salary paid to staff for work done as a part of an agency IT Project, per project, and keep that total for use in the Proposed IT Investments table.	
3	Sum all bonuses paid to IT classified personnel and the percentage of bonuses paid to non-IT classified personnel using the same percentage as in Step 2. Subtract any bonuses or the percentage of bonuses paid to staff for work done as a part of an agency IT Project, per project, and keep that total for use in the Proposed IT Investments table.	
4	Subtotal costs identified in Steps 1, 2, and 3.	
5	Multiply the subtotal from Step 4 by 1.28. This represents the average cost of benefits for personnel.	
6	Sum all IT-related training costs not included in an IT project budget (including tuition, books, fees, etc.).	
7	Sum all IT-related travel costs not included in an IT project budget (including gas, mileage, accommodation, fares, etc.).	
8	Total costs identified in Steps 4, 5, 6, and 7. This represents the estimated base Agency IT Staff costs for the previous year.	
9	Adjust the total identified in Step 8 up or down depending on anticipated changes in agency IT staffing needs for the first year of the next biennium. Do not include the cost of non-agency IT staff acquired through a staff augmentation contract or the staff assigned to an IT project in this estimate.	
10	Determine how much of the Agency IT Staff costs identified in Step 9 will be funded from general fund dollars.	
11	Determine how much of the Agency IT Staff costs identified in Step 9 will be funded from non-general fund dollars.	
12	Adjust the total identified in Step 9 up or down depending on anticipated changes in agency IT staffing needs for the second year of the next biennium. Do not include the cost of non-agency IT staff acquired through a staff augmentation contract or the staff assigned to an IT project in this estimate.	
13	Determine how much of the Agency IT Staff costs identified in Step 12 will be funded from general fund dollars.	
14	Determine how much of the Agency IT Staff costs identified in Step 12 will be funded from non-general fund dollars.	

Non-agency IT Staff

Estimate the cost of non-agency IT staff acquired through an existing, approved staff augmentation contract for IT service or support. This includes the IT staffing portion of fees paid to application service providers. In addition, if non-agency, non-IT staff will be assigned IT work during the biennium; include the portion of non-agency, non-IT staff salaries paid for IT work. Also include the cost of staff on loan from another agency, unless that staff salary is included in a project budget. Do not include the estimated cost of non-agency IT staff that will be acquired through a newly proposed IT staff augmentation contract, or the cost of non-agency IT staff assigned to an IT project in this estimate.

Cloud Computing Service

Estimate the ongoing costs of cloud computing services not provided by VITA. Includes the application cost portion of fees paid to application service providers. Do not include the estimated purchase cost of applications that will be acquired through a newly proposed IT procurement.

Other Application Costs

Estimate the ongoing costs of application fees and licensing not covered under VITA infrastructure. Includes the application cost portion of fees paid to application service providers. Do not include the estimated purchase cost of applications that will be acquired through a newly proposed IT procurement.

Proposed IT Investments Table

Proposed IT Investments represent the estimated costs of all projects and procurements that will be incurred during the upcoming biennium. These estimated costs come from either new projects or procurements or from existing projects or procurements that will carry over into the following biennium. The costs of supporting applications beyond the implementing project or procurement end date will be estimated in the Current IT Service table.

Note that any proposed investments that are associated with a grant must be entered into CTP prior to, or at the time of, submitting the grant application. Many grants have very strict timelines; and in order to meet these timelines, it is important for the agency to obtain planning approval as soon as the decision is made to apply.

An IT project is a temporary endeavor undertaken to create a unique IT product, service, or result. An IT procurement is a temporary endeavor undertaken to obtain goods or services. Included are all activities from the planning steps and preparation and processing of a requisition, through receipt and acceptance of delivery, to the processing of a final invoice for payment. The estimated costs of ongoing IT operations and maintenance activities are entered into the Current IT Services table.

The Proposed IT Investments table will be populated with entries made by the agency, based upon values existing in CTP. To make changes to the table below, the agency must change the data in CTP. Agency-level IT projects or projects that fall below the \$250,000-threshold are not

typically entered into CTP and those related expenses will need to be entered into this table from data maintained by the agency.

Proposed IT Investments				
Category	Costs – Year One		Costs – Year Two	
	General Fund	Non-general Fund	General Fund	Non-general Fund
Major IT Projects	entered by agency*	entered by agency*	entered by agency*	entered by agency*
Non-major IT Projects	entered by agency*	entered by agency*	entered by agency*	entered by agency*
Agency-level Projects	calculated & entered by agency	calculated & entered by agency	calculated & entered by agency	calculated & entered by agency
Major Stand Alone IT Procurements	entered by agency*	entered by agency*	entered by agency*	entered by agency*
Non-major Stand Alone IT Procurements	entered by agency*	entered by agency*	entered by agency*	entered by agency*
Agency-Level Stand Alone IT Procurements	calculated & entered by agency	calculated & entered by agency	calculated & entered by agency	calculated & entered by agency
Procurement Adjustment for Staffing Contracts	calculated & entered by agency (see description below)	calculated & entered by agency (see description below)	calculated & entered by agency (see description below)	calculated & entered by agency (see description below)
Total	Calculated	Calculated	Calculated	Calculated

**Refer to the end of this section for the process steps for entering all Major/Non-major IT Project Totals and all Major/Non-major Stand Alone IT Procurements into the Proposed IT Investments Table*

Major IT Projects

A major IT project is defined in the *Code of Virginia* (§ 2.2-2006) as “any Commonwealth information technology project that has a total estimated cost of more than \$1 million or that has been designated a major information technology project by the CIO pursuant to the Commonwealth Project Management Standard developed under § 2.2-2016.1.” Agencies are required to estimate and track the cost of current agency and non-agency IT staff who will be assigned to work on any agency Major IT Project. The estimated cost of current agency and non-agency IT staff assigned to Major IT Projects **must not** be included in the Agency and Non-agency IT Staff cost estimates in the Current IT Services table. IT Project costs must include the amount of the agency's operating appropriation that will be spent on project activities. The total cost of all Major IT Projects proposed for the upcoming biennium will be calculated from within CTP and will need to be transferred into the Proposed IT Investments Table by the agency. Refer to the end of this section for the process steps to transfer the Major IT Project Totals into the Proposed IT Investments Table.

Non-major IT Projects

Non-major IT Projects are those technology projects with a total estimated cost greater than or equal to \$250,000, and less than \$1 million that are not designated as Major IT Projects by the Secretary of Administration. The total cost of all Non-major IT Projects proposed for the upcoming biennium will be calculated from within CTP and will need to be transferred into the Proposed IT Investments Table by the agency. The estimated costs of current agency and non-agency IT staff assigned to Non-major IT Projects **must not** be included in the agency and Non-agency IT Staff cost estimates in the current IT Services table—those costs are included here. IT Project costs must include the amount of the agency's operating appropriation that will be spent on project activities.

The total cost of all Non-major IT Projects proposed for the upcoming biennium will be calculated from within CTP and will need to be transferred into the Proposed IT Investments Table by the agency. Refer to the end of this section for the process steps to transfer the Non-major IT Project Totals into the Proposed IT Investments Table.

Agency-level IT Projects

Agency-level IT Projects are those technology projects with a total estimated cost less than \$250,000 that are not designated as Major IT Projects by the Secretary of Administration. The estimated costs of current agency and non-agency IT staff assigned to agency-level IT Projects must **not** be included in the agency and Non-agency IT Staff cost estimates in the Current IT Services table—those costs are included here. IT Project costs must include the amount of the agency's operating appropriation that will be spent on project activities.

This row will need to be calculated by the agency and then entered in this row.

Major Stand Alone IT Procurements

Procurements are used to obtain goods or services and include all activities from the planning steps, preparation and processing of a requisition, through receipt and acceptance of delivery and processing of a final invoice for payment. Major IT procurements are those procurements with an estimate cost equal to or greater than \$1 million. A Stand Alone Procurement is a procurement that is not associated with any IT project: for example, a procurement for non-agency IT staff that will be acquired through a proposed staff augmentation contract for IT service or support, or a procurement to pay the costs, fees, and licensing of a new commercial, off-the-shelf application. For application procurements, the estimate will include the application costs portion of fees that will be paid to application service providers under a newly proposed contract. An IT procurement or a solution request that must be executed in order to complete a project will be included in the IT project cost estimate.

The total cost of all Major Stand Alone IT Procurements proposed for the upcoming biennium will be calculated from within CTP and will need to be transferred into the Proposed IT Investments Table by the agency. Refer to the end of this section for the process steps to transfer the Major Stand Alone IT Procurement Totals into the Proposed IT Investments Table.

Non-major Stand Alone IT Procurements

Procurements are used to obtain goods or services and include all activities from the planning steps, preparation and processing of a requisition, through receipt and acceptance of delivery and processing of a final invoice for payment. Non-major IT procurements are those procurements with an estimate greater than or equal to \$250,000 and less than \$1 million. A Stand Alone Procurement is a procurement not associated with an IT project: for example, a procurement for non-agency IT staff that will be acquired through a proposed staff augmentation contract for IT service or support, or a procurement to pay the costs, fees, and licensing of a new commercial, off-the-shelf application. For application procurements, the estimate will include the application costs portion of fees that will be paid to application service providers under a newly proposed contract. A non-major IT procurement or an RFS that must be executed in order to complete a project will be included in the IT project cost estimate.

The total cost of all Non-major Stand Alone IT Procurements proposed for the upcoming biennium will be calculated from within CTP and will need to be transferred into the Proposed IT Investments Table by the agency. Refer to the end of this section for the process steps to transfer the Non-major Stand Alone IT Procurement Totals into the Proposed IT Investments Table.

Agency-level Stand Alone IT Procurements

Agency-level IT Procurements are those technology procurements with a total estimated cost less than \$250,000. IT Procurement costs must include the amount of the agency's operating appropriation that will be spent on procurement activities. Note that this row will need to be calculated by the agency and then entered in this row.

Procurement Adjustment for Staffing Contracts

For agencies with staff augmentation procurements, the staff augment procurement cost is included in the Major or Non-Major Procurement cost line. These resources and associated costs may already be included in the Non-Agency IT Staff line (for O&M) or in a project on the Major or Non-Major IT project line. The Procurement Adjustment for Staffing Contracts line should be a negative number which cancels out the double count that occurs with the staff augment contract and the project or the Non-Agency IT Staff line.

Process Steps to Transfer Major/Non-major Projects and Major/Non-major Stand Alone IT Procurements

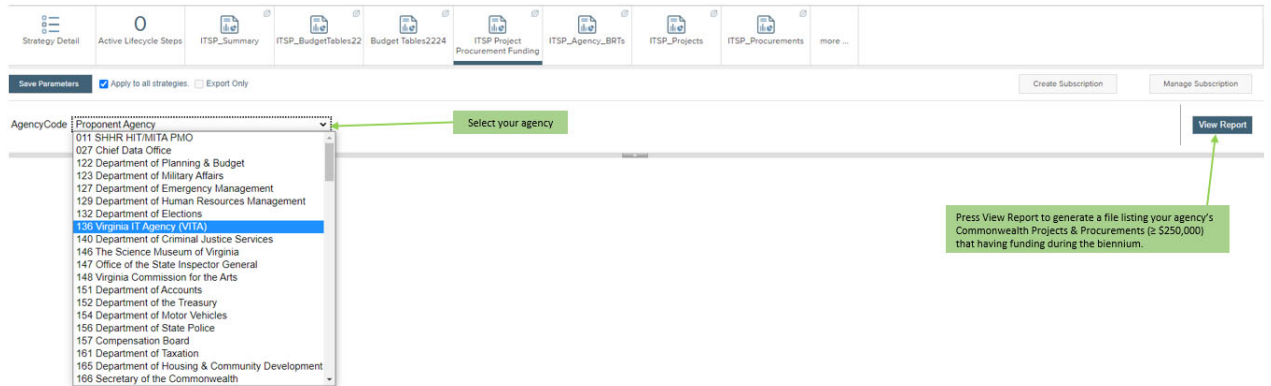
Retrieve ITSP Project Procurement Funding tile

- From the Ribbon, select **more...**
- Select **Manage** button
- Drag **ITSP Project Procurement Funding** tile from **Available Tiles** list to **Display** list and position where you wish in the display sequence.
- Press **Save** button

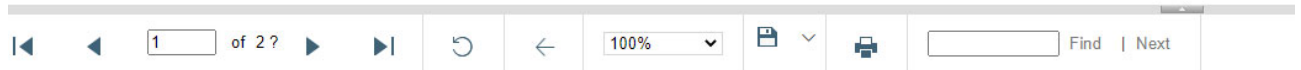
Retrieve expense totals for Commonwealth Projects and Procurements

- Select **ITSP Project Procurement Funding** tile
- Expand **View Report** feature by selecting the arrow in middle of the thin, gray bar

- Select your agency from the **Agency Code** dropdown list
- Press **View Report** button



AgencyCode 136 Virginia IT Agency (VITA)



ITSP Project / Procurement Funding

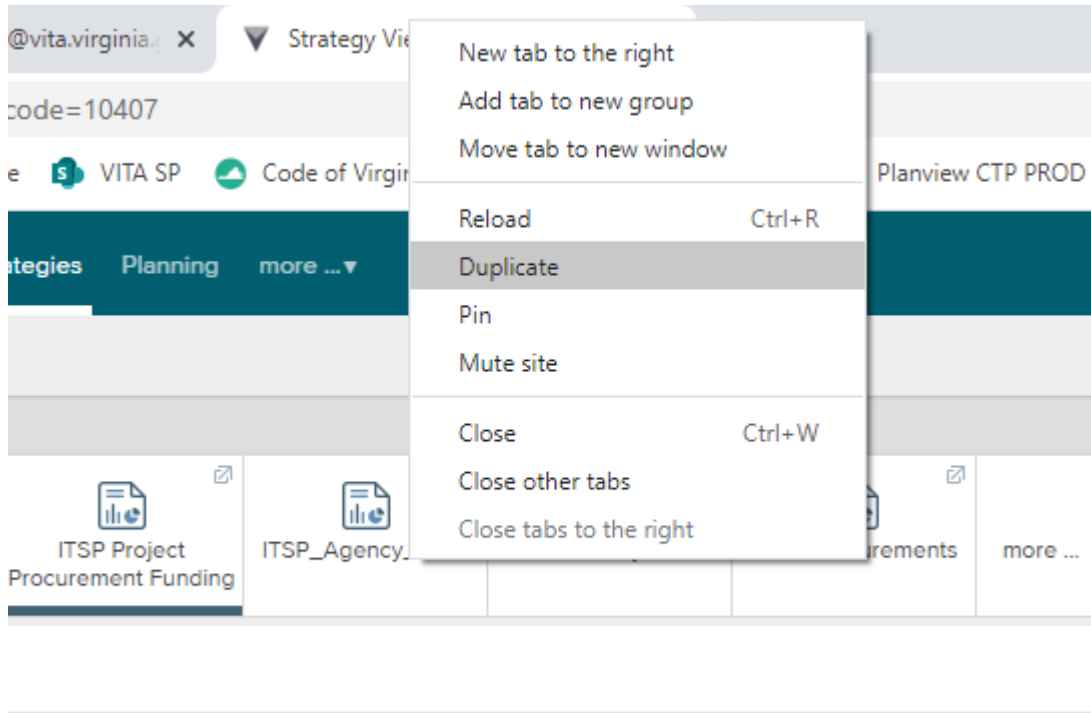
Major Projects

136 Virginia T Agency (VITA)	Project Title	Total Cost	GF 23	NGF 23	GF 24	NGF 24
	CTP Modernization Project	\$1,661,425.00				
	Data Center Move	\$10,400,233.00				
	Messaging Services 2.0 Project	\$10,000,000.00				
	VSP Transformation Project	\$44,361,225.00	\$12,800,000.00		\$20,900,000.00	
	Totals		\$12,800,000.00		\$20,900,000.00	

Non-Major Projects

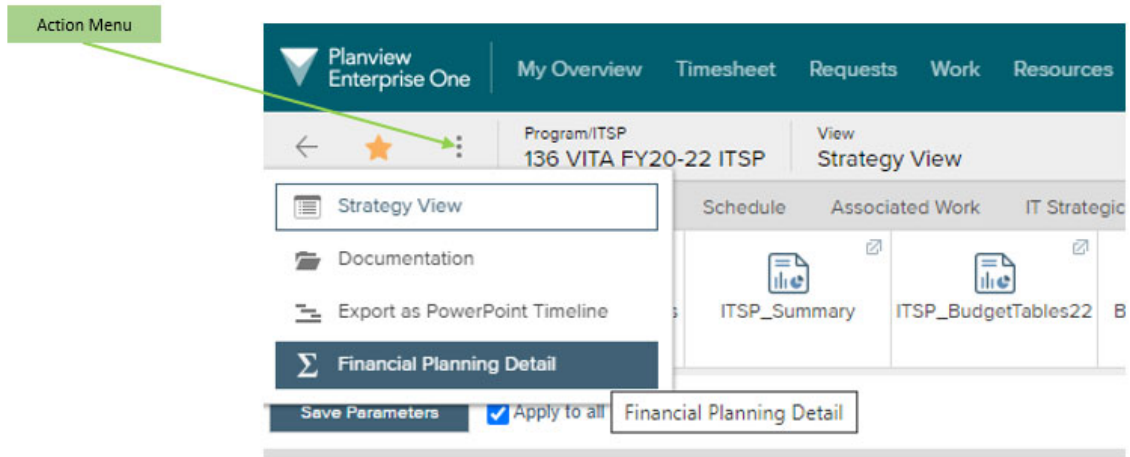
136 Virginia T Agency (VITA)	Project Title	Total Cost	GF 23	NGF 23	GF 24	NGF 24
	EO19_VITA_Aggregate Rehost	\$655,500.00				
	EO19_VITA_AIS Oracle Physical Servers	\$800,000.00				
	EO19_VITA_ISP Imaging_Repurchase	\$92,000.00				
	Mainframe Strategy	\$880,000.00				
	MSI Data Center Architectural	\$973,213.00				

- Duplicate the tab on your Internet browser

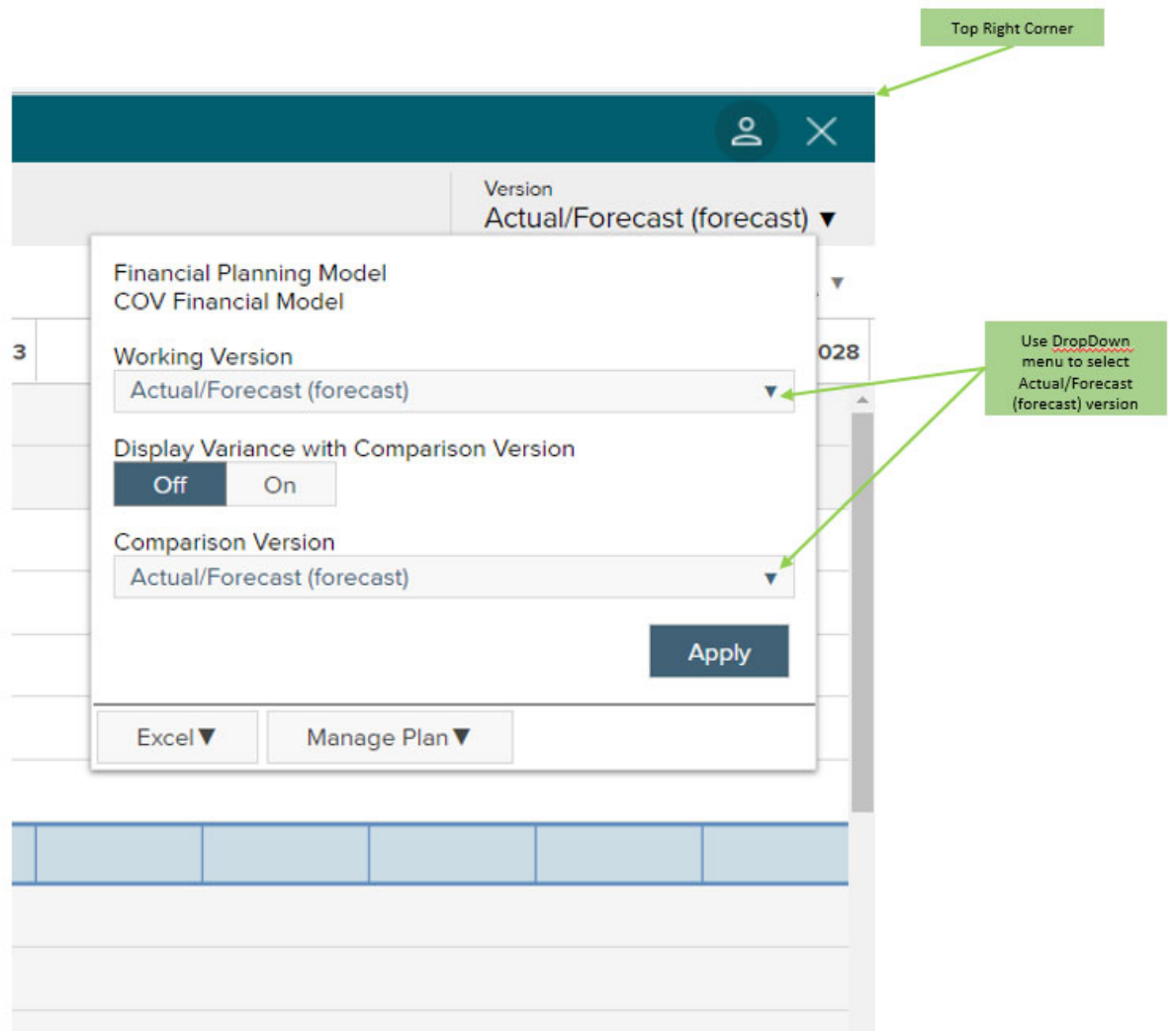


Transfer expense totals to ITSP Financial Planning Detail form

- Select **Financial Planning Detail** tile from the Action Menu (three stacked dots immediately left of ITSP title)



- Ensure the **Financial Planning Detail** form is using the **Actual/Forecast (forecast)** version.



- Collapse and then expand **Financial Planning Detail** to display only the **Funding** rows & only the fiscal year columns of upcoming biennium (i.e., 23, 24) by following the steps below:

Step A

Collapse all rows by pressing arrow

Description	Measures	Line Notes	2016
▼ Program/ITSP: 136 VITA 2022-24 ITSP	USD		
▼ Type: IBC - Benefits	USD		
> Cost Avoidance	USD		
> Cost Savings	USD		
> Increased Efficiency	USD		
> Increased Revenues	USD		
> Other cost savings	USD		
▼ Type: Funding	USD		
▼ > General Funds	USD		
▼ >> GF Current IT Services	USD		
▼ >>> GF Estimated VITA Infrastructure	USD		
>>>> Projected Service Fees	USD		
>>>> VITA Infrastructure Changes	USD		
>>> Specialized Infrastructure	USD		
>>> Agency IT Staff	USD		
>>> Non-agency IT Staff	USD		
>>> Cloud Computing Service	USD		
>>> Other Application Costs	USD		
▼ >> GF Proposed IT Investments	USD		

Step B

Expand rows

Description	Measures	Line Notes	2016
> Program/ITSP: 136 VITA 2022-24 ITSP	USD		

Step C

	Description	Measures	Line
Expand ITSP name row	Program/ITSP: 136 VITA 2022-24 ITSP	USD	
	> Type: IBC - Benefits	USD	
Expand Funding row	Type: Funding	USD	
	>> General Funds	USD	
	>> Non General Funds	USD	
	> Federal Funds	USD	
	> Other	USD	
	> Type: Funding Need	USD	
	> Type: Budget Plan - Costs	USD	
	> Type: O&M	USD	
	Type: Labor	USD	

Step D - Expand **General Funds (GF)** and/or **Non General Funds (NGF)** rows for the Proposed IT Investments rows

Expand General Funds rows and/or Non General Fund rows as needed

▼ Description	Measures	Line Notes
▼ Program/ITSP: 136 VITA 2022-24 ITSP	USD	
> Type: IBC - Benefits	USD	
▼ Type: Funding	USD	
▼ > General Funds	USD	
>>> GF Current IT Services	USD	
▼ >>> GF Proposed IT Investments	USD	
>>>> Major IT Projects	USD	
>>>> Non-Major IT Projects	USD	
>>>> Agency-Level IT Projects	USD	
>>>> Major Stand Alone IT Procurements	USD	
>>>> Non-Major Stand Alone IT Procurements	USD	
>>>> Agency-Level Stand Alone IT Procurements	USD	
>>>> Procurement Adjustment for Staffing	USD	
>> Non General Funds	USD	
> Federal Funds	USD	
> Other	USD	

Step E

▼ Description	Measures
▼ Program/ITSP: 136 VITA 2022-24 ITSP	USD
> Type: IBC - Benefits	USD
▼ Type: Funding	USD
▼ > General Funds	USD
> >> GF Current IT Services	USD
▼ >> GF Proposed IT Investments	USD
>>> Major IT Projects	USD
>>> Non-Major IT Projects	USD
>>> Agency-Level IT Projects	USD
>>> Major Stand Alone IT Procurements	USD
>>> Non-Major Stand Alone IT Procurements	USD
>>> Agency-Level Stand Alone IT Procurements	USD
>>> Procurement Adjustment for Staffing	USD
>> Non General Funds	USD
> Federal Funds	USD
> Other	USD

Project / Procurement expense totals will be entered in the rows under Proposed IT Investments (GF / Non GF)

Note: Expand Non General Funds rows as needed



Step F – View only biennium columns

▼ Description	Measures	Line Notes	2023	2024	Total
▼ Program/ITSP: 136 VITA 2022-24 ITSP	USD				
> Type: IBC - Benefits	USD				
▼ Type: Funding	USD				
▼ > General Funds	USD				
>>> GF Current IT Services	USD				
▼ >>> GF Proposed IT Investments	USD				
>>>> Major IT Projects	USD				
>>>> Non-Major IT Projects	USD				
>>>> Agency-Level IT Projects	USD				
>>>> Major Stand Alone IT Procurements	USD				
>>>> Non-Major Stand Alone IT Procurements	USD				
>>>> Agency-Level Stand Alone IT Procurements	USD				
>>>> Procurement Adjustment for Staffing	USD				
>> > Non General Funds	USD				
> Federal Funds	USD				
> Other	USD				
> Type: Funding Need	USD				
> Type: Budget Plan - Costs	USD				

- Copy & Paste GF/NGF totals by year (highlighted in green) from Major Projects, Non-Major Projects, Major Procurements, and Non-Major Procurements as listed and paste in corresponding fields in the Financial Planning Detail.

AgencyCode 136 Virginia IT Agency (VITA)

1 of 2 ? 100% Find | Next

ITSP Project / Procurement Funding

Major Projects

Project Title	Total Cost	GF 23	NGF 23	GF 24	NGF 24
CTP Modernization Project	\$1,661,425.00				
Data Center Move	\$10,400,233.00				
Messaging Services 2.0 Project	\$10,000,000.00				
VSP Transformation Project	\$44,361,225.00	\$12,800,000.00		\$20,900,000.00	
Totals		\$12,800,000.00		\$20,900,000.00	

Non-Major Projects

Project Title	Total Cost	GF 23	NGF 23	GF 24	NGF 24
EO19_VITA_Aggregate Rehost	\$655,500.00				
EO19_VITA_AIS Oracle Physical Servers	\$800,000.00				
EO19_VITA_JSP Imaging_Repurchase	\$92,000.00				
Mainframe Strategy	\$880,000.00				
MCI Data Center Architectural	\$973,213.00				

Copy Totals and Paste in the corresponding cells on the Financial Planning Detail form

Program/ITSP		View				
136 VITA 2022-24 ITSP		Financial Planning Detail				
Description	Measures	Line Notes	2023	2024	Total	
Program/ITSP: 136 VITA 2022-24 ITSP	USD					
> Type: IBC - Benefits	USD					
> Type: Funding	USD					
>> General Funds	USD					
>>> GF Current IT Services	USD					
>>> GF Proposed IT Investments	USD					
>>> Major IT Projects	USD		12,800,000.00	20,900,000.00	33,700,000	
>>> Non-Major IT Projects	USD					
>>> Agency-Level IT Projects	USD					
>>> Major Stand Alone IT Procurements	USD					
>>> Non-Major Stand Alone IT Procurements	USD					
>>> Agency-Level Stand Alone IT Procurements	USD					
>>> Procurement Adjustment for Staffing	USD					
>> Non General Funds	USD					

Totals from ITSP Project/Procurement Funding report pasted in cells

- Copy & Paste Totals from Major & Non-Major IT Projects and Major & Non-Major Stand Alone IT Procurements
- Ensure totals pasted are correct.

Projected Total IT Budget Table

The values in the Total IT investments table are calculated from the values entered in the previous tables.

Projected Total IT Budget				
Category	Costs – Year One		Costs – Year Two	
	General Fund	Non-general Fund	General Fund	Non-general Fund
Current IT Services:	Calculated in CTP	Calculated in CTP	Calculated in CTP	Calculated in CTP
Proposed IT Investments:	Calculated in CTP	Calculated in CTP	Calculated in CTP	Calculated in CTP
Total:	Calculated in CTP	Calculated in CTP	Calculated in CTP	Calculated in CTP

3. Information Technology Business Requirements and Investments

Information Technology Business Requirements and Investments (historically known collectively as Appendix A) provides details on Commonwealth IT Business Requirements and Investments for the upcoming budget biennium. Information Technology Business Requirements and Investments are maintained in CTP.

Agencies must document all Business Requirements for Technology (i.e., BRnTs and BRtTs), as well as IT projects with a total cost equal to or greater than \$250,000, or IT procurements with a total cost equal to or greater than \$250,000 in CTP. These projects or procurements are considered Commonwealth IT Investments.

If the agency has an ongoing Commonwealth IT Investment for the upcoming budget biennium, and the upcoming, estimated IT project or procurement cost needs revision, changes must be made to the actual project or procurement in the Commonwealth Technology Portfolio with the appropriate CIO approvals to change costs in the ITSP budget table.

The Information Technology Business Requirements and Investments in CTP are a detailed view of the agency’s IT business requirements and investments that identify the alignment of each to the agency’s service areas as well as to commonwealth goals and objectives. In addition, they provide detailed views of an agency’s commonwealth investments or projects and procurements which include greater-detailed information (i.e., costs, start and end dates, service area owner, funding status) provided by the agency. The agency will enter this information into CTP.

Embedded within CTP workflow (i.e., lifecycle) is specific guidance regarding the completion of agency IT Investment information. For information on how to gain access to CTP, agencies should contact their Customer Account Manager (CAM).

The AITR has access to CTP and is generally responsible for ensuring the accuracy of Commonwealth Technology Portfolio entries. For additional information about your agency's use of CTP, please contact your AITR or your agency CAM.

Although the estimated cost at completion for procurements is entered into CTP, it is intentionally left blank when the procurement is published in the IT Strategic Plan; Only the costs relevant for the biennium are published.

Commonwealth Procurements

Agencies are to generate a list of all IT expenditures that were made in the previous biennium from eVA; determine which ones are reoccurring; and enter the BRT plus the procurement business alignments for these procurements into CTP for the upcoming biennium. In addition, agencies are to identify all new procurements expected to commence in the upcoming biennium and complete a BRT plus the corresponding procurement business alignment (PBA) form in CTP.

Commonwealth Projects

Agencies are to identify all projects that are expected to commence in the upcoming biennium (which begins on July 1 for commonwealth agencies for a given fiscal year) and submit a corresponding IBC for approval. Note that this IBC must be linked to a BRT. If a BRT does not exist, one must be entered at the time the IBC is entered.

Investment Categories

Commonwealth IT investments are classified into one of five categories:

- **Business Requirements for Technology (BRT)** – Business Requirements for Technology addresses agencies' need to capture valid long term business needs before it can be determined what type of investment is required. Note that a BRT must be entered for each agency Operational Risk or Issue (OR/I). There are two types of BRTs (mentioned earlier): Business Requirements for new Technology (BRnT) and Business Requirements for existing Technology (BReT).

A BRnT is entered when the following applies:

- Business requirements for NEW FUNCTIONS (e.g., adding new functionality to an existing app, implementing support for new business functions or reorganizing existing business functions)
- No technology answer exists at this time

A BReT is entered when the following applies:

- Release upgrades
- Specialized hardware/software upgrades

- Infrastructure
- Contract renewals
- Business requirements for supporting existing technology
- Replacement of an existing investment

Note that an agency can get as granular as necessary with documenting BReTs but the minimum threshold is as follows. It is acceptable to group Operations and Maintenance BReTs into logical functional groups (for example, a BReT for renewals). When setting up a BReT for a logical functional group, it is important for the agency to document the details in the BReT description category.

- **Major IT Projects** – Major IT Project is a budget category defined in the Code of Virginia (§ 2.2-2006) as “Commonwealth information technology project, means any state agency information technology project that is under Commonwealth governance and oversight.” A Commonwealth information technology project has a total estimated cost of more than \$1 million or has been designated a major information technology project by the CIO pursuant to the Commonwealth Project Management Standard developed under § 2.2-2016.1.
- **Non-major IT Projects** – Non-major IT Project is a budget category for all IT Projects, except those designated as Major IT Projects by the Secretary of Administration, with a total cost greater than or equal to \$250,000 and less than or equal to \$1 Million.
- **Major Stand Alone IT Procurements** – Major Stand Alone IT Procurements are those procurements with a total cost greater than or equal to \$1 million that are used to obtain IT goods or services *not* associated with a project.
- **Non-major Stand Alone IT Procurements** – Non-major Stand Alone IT Procurements are those procurements with a total cost between \$250,000 and \$1 million that are used to obtain IT goods or services *not* associated with a project.
- **Agency-level IT Projects and Procurements** – Investments with a total cost below \$250,000 are not entered in the Projects or Procurements sections of the IT Strategic Plan, **however their biennial costs must be estimated and entered in the Proposed IT Investments – Estimated Costs for Projects and New IT Investments table in the IT Budget Estimation Tables by the agency.**

The total costs of Major IT Projects, Non-major IT Projects, Major Stand Alone IT Procurements, and Non-major Stand Alone IT Procurements will be entered into Proposed IT Investments – Estimated Costs for Projects and New IT Investments table as described above.

Project-related Procurements

Procurements which must be executed in order to complete a project are called Project-related Procurements. Project-related Procurement costs are included in the total project cost and are not reported separately.

A Major IT Project can have:

- Major IT Project-related procurements and/or
- Non-major IT Project-related procurements

A Non-major IT Project can only have:

- Non-major IT Project-related procurements

Examples of project-related procurements are:

- A procurement of software used to complete a project
- A procurement of specialized hardware deployed as the result of a project, such as a point-of-sale system
- A procurement for contract IT staff to work on a specific project

Grants

Any IT investments that are associated with a grant must be entered into the Commonwealth Technology Portfolio prior to or at the time of submitting the grant application. This is in addition to the requirements found in §4-1.04 of the Appropriation Act.

Many grants have strict timelines. In order to meet these timelines, it is important for the agency to obtain planning approval as soon as the decision is made to apply for the grant.

Some secretariats require agencies to submit grants that require an IT investment to the secretariat for approval prior to submitting the grant application to the grantor. If your grant-related IT investments require secretariat approval, please obtain approval before entering the grant-related IT investments into the Commonwealth Technology Portfolio.

Major IT Project Example

Budget Category: Major Projects	
Medical Case Management System (MCMS) Project – (please note this is an example, not an actual project)	
Oversight and Governance Category: Category 1: High/High	
Appropriation Act/Funding Status	Project Initiation Approval - Fully Funded GF/NGF 100%
<p>The Medical Case Management System (MCMS) Project will identify the requirements, plan, and execute development of an application which will streamline all of the agency’s medical case management business processes. Currently the agency uses multiple legacy systems to manage stages in the case management cycle. The legacy systems are expensive to maintain (compared to more modern systems with similar functionality), are not fully integrated and subsequently duplicate case data, and are not flexible enough to quickly adapt to changes in regulation. The legacy systems’ decreasing performance is the primary driver of a trend toward lower agency case productivity. The MCMS Project will produce a system that automates case workflow, manages the agency’s compliance needs, reports on agency case management productivity, and eliminates redundant</p>	

Budget Category: Major Projects				
Medical Case Management System (MCMS) Project – (please note this is an example, not an actual project)				
<p>data storage. In addition to the operational benefits, the agencies anticipates that the MCMS application will reduce the time the agency spends in non-treatment case administration by at least 50%, thereby providing the agency’s patients with a significant decrease in wait times.</p> <p>The agency’s case management performance reporting needs are well within the capabilities of leading COTS (Commercial, Off-The-Shelf) reporting software. The MCMS Project will procure and install a COTS reporting tool, and integrate the tool into the MCMS application.</p> <p>The MCMS will improve overall performance in four agency service areas. The system will also improve agency performance in:</p> <ul style="list-style-type: none"> • Virginia Performs Key Measure - Improve the quality of medical case services provided to Virginia citizens; • Virginia Performs Productivity Measure - Decrease time required to process to a citizen’s medical case; • Virginia Performs Productivity Measure - Provide efficient and effective administration and support to case management services provided by the agency; and, • Virginia Performs Administrative Measure – Increase compliance with IT Accessibility and Information Security standards. <p>The current legacy case management systems use data provided by other agencies, and in turn provides data to our partner agencies. When we discussed the MCMS Project with our partner agencies they expressed a strong interest in participating in the project, e.g., adding their case management requirements to ours and building a single system for use across all participating agencies. Our agency is willing to act as the lead agency in a Commonwealth-wide MCMS Project.</p> <p>Per Code of Virginia mandate, the funding for this Major IT Project has been identified in the agency’s budget. Please note that the Estimated Costs, the Procurement Cost, and the Planned Project End Date are for the agency-only MCMS Project. A Commonwealth-wide MCMS Project will require additional funds and additional time for completion.</p>				
Is this a proposed project or the continuation of an active project?				Proposed
Planned Project Start Date:	02/01/2022	Planned Project End Date:		10/31/2023
Estimated Costs:	Total	General Fund	Non-general Fund	Non-general Funding Source
Project Cost (estimate at completion):	\$6,500,000	\$5,000,000	\$1,500,000	Non-general State
Estimated project expenditures first year of biennium:	\$2,500,000	\$1,750,000	\$750,000	Non-general State
Estimated project expenditures second year of biennium:	\$4,000,000	\$3,250,000	\$750,000	Non-general State
Funding Required:	Total	General Fund	Non-general Fund	Non-general Funding Source
Funding required for first year of biennium:	\$0	\$0	\$0	N/A
Funding required for second year of biennium	\$0	\$0	\$0	N/A
Project Related Procurements				
Medical Case Management System (MCMS) Reporting Tool				
Procurement Description:	The agency’s case management performance reporting needs are well within the capabilities of leading C.O.T.S. (Commercial, Off-The-Shelf) reporting software. The MCMS Project will procure and install a COTS reporting tool with a minimum 5-year license, and integrate the tool into the MCMS application.			
Planned Delivery Date:	06/01/2022	Procurement Cost:	\$125,000	

Non-major IT Project Example

Budget Category: Non-major IT Projects				
Processing Application Enhancement (PAE) Project – (please note this is an example, not an actual project)				
Oversight and Governance Category: Category 4: Low/Medium, Low/Low				
Appropriation Act/Funding Status		Identified for Preliminary Planning - Fully Funded GF 100%		
<p>The Processing Application Enhancement (PAE) Project will identify the requirements, plan, and execute a workflow routing enhancement to the agency’s processing application. Currently, the processing application doesn’t have workflow functionality, and requires managers to log into the system and assign work to agency staff. The planned enhancement will automatically route work to staff using a role-based system. The workflow enhancement will improve agency productivity, eliminate duplicate work assignments, and improve process exception handling.</p> <p>The agency’s processing service area has an objective to complete 95% of the processing within 3 business days of receipt. The PAE Project performance will be measured on its ability to contribute to the service area’s performance measure. For the last four quarters the service area has averaged 89% completion against the measure. Barring unforeseen process changes, for each quarter after the PAE Project is complete the service area expects to perform at or above the 95% mark.</p> <p>The contract application development team that developed the Processing Application in 2005, and did the development work on a previous upgrade in 2007, has quoted the agency a price of \$400,000 +/- 10% based detailed requirements. This cost includes a development team and a Commonwealth-qualified project manager.</p>				
Is this a proposed project or the continuation of an active project?				Proposed
Planned Project Start Date:	10/01/2022	Planned Project End Date:		08/01/2023
Estimated Costs:	Total	General Fund	Non-general Fund	Non-general Funding Source
Project Cost (estimate at completion):	\$440,000	\$440,000	\$0	General State
Estimated project expenditures first year of biennium:	\$150,000	\$150,000	\$0	General State
Estimated project expenditures second year of biennium:	\$290,000	\$290,000	\$0	General State
Funding Required:	Total	General Fund	Non-general Fund	Non-general Funding Source
Funding required for first year of biennium:	\$150,000	\$150,000	\$0	N/A
Funding required for second year of biennium	\$290,000	\$290,000	\$0	N/A
Service Area		Weight		
Service Area ID# Processing Service Area		Primary		
Service Area ID# Information Technology Services		Secondary		
Project Related Procurements				
There are no procurements for this project.				
Procurement Description:				
Planned Delivery Date:		Procurement Cost:		

Major Stand Alone IT Procurement Example

Procurement Name:	Chemical Disaster Management System (CDMS) Procurement – (please note this is an example, not an actual procurement)		
Procurement Description:	<p>The agency will procure a web-based, industry-leading commercial, off-the-shelf software suite for managing emergency responses to large-scale chemical hazards such as chemical spills, chemical-fueled fires, and industrial accidents. CDMS will integrate agency facilities and response teams into the emergency management systems in use by federal, state and local agencies during actual declared states of emergency or preparedness events such as training and exercises. CDMS will:</p> <ul style="list-style-type: none"> Track and report the scope and impact of chemical disasters in real-time; Disseminate medical treatment information to first responders and hospitals; and, Manage containment and clean-up activities, including personnel and supplies; <p>The CDMS will improve overall performance in three agency service areas. The system will also improve agency performance in:</p> <ul style="list-style-type: none"> Virginia Performs Key Measure - Protect Virginia citizens against chemical disasters; Virginia Performs Productivity Measure - Decrease time required to respond to chemical disasters; Virginia Performs Productivity Measure - Provide efficient and effective administration and support to chemical disaster response services provided by the agency; and, Virginia Performs Administrative Measure – Increase compliance with IT Accessibility and Information Security standards. 		
Procurement Planned Start Date	05/01/2022	Procurement Planned Completion Date	06/01/2022
Procurement cost (estimate at completion):	Intentionally Left Blank	Appropriation Act Status	

Non-major Stand Alone IT Procurement Example

Procurement Name:	IT Staff Augmentation Procurement – (please note this is an example, not an actual procurement)		
Procurement Description:	<p>This procurement is to augment existing agency staff with one senior database administrator and three junior application developers to support the agency’s applications. The agency has five applications which need hands-on data, user interface, and general troubleshooting support. The IT Staff Augmentation procurement will:</p> <ul style="list-style-type: none"> • Provide staff to resolve tickets in the agency’s application support queue; and, • Provide staff to execute small (less than \$250,000 total cost) enhancements to agency applications as needed. <p>The five agency applications served by this procurement support performance in four agency service areas.</p>		
Procurement Planned Start Date	07/15/2022	Procurement Planned Completion Date	08/01/2023
Procurement cost (estimate at completion):	Intentionally Left Blank	Appropriation Act Status	

4. Agency Application Portfolio in ARCHER

Archer is the tool of record for maintaining an agency’s information related to their applications and associated business processes, devices and data set names. Prior to submitting the agency ITSP for review and approval, agencies must update records in Archer and then certify that the application is accurate.

Archer may be accessed by going to <https://itgrcs.vita.virginia.gov/apps/ArcherApp/Home.aspx>. If you do not already have a COV account, you will need to request a new COV account. Contact the VCCC at (866) 637-8482 or vccc@vita.virginia.gov and request that you be sent a COV account request form. Or, contact your agency CAM for assistance.

Instructions for Archer may be accessed at <https://www.vita.virginia.gov/media/vitavirginiagov/commonwealth-security/pdf/Archer-User-Manual-2021.pdf>

5. CIO Approval

To submit the agency ITSP for CIO review and approval, both AITR and agency head approvals must have been entered in CTP for the IT Strategic Plan.

6. The Relationship between the Agency ITSP and an Agency Service Area Plan for IT

While the entire ITSP is entered into the Commonwealth Technology Portfolio, it is still part of the DPB strategic planning process. The ITSP is posted on the VITA website which DPB links to from their site.

A few agencies have a service area dedicated to IT; e.g., DSS, VDOT. If an agency has an IT service area, that service area provides the foundation for the agency ITSP. However, the service area is more of an operational or tactical plan. The budget numbers that are keyed into

the service area are constrained or must reconcile to the Budget so the only investments that are addressed in the service area plan are those investments that are funded.

An agency's ITSP is strategic plan and is not constrained. This allows agencies to document all their business needs (both from an operational perspective as well as proposed investment perspective) whether or not they are funded. As a result, the content in the ITSP will not match exactly what is in the service area plan for IT because the ITSP has a much broader scope.