



# January 2018 Department of Planning and Budget Major Project Report

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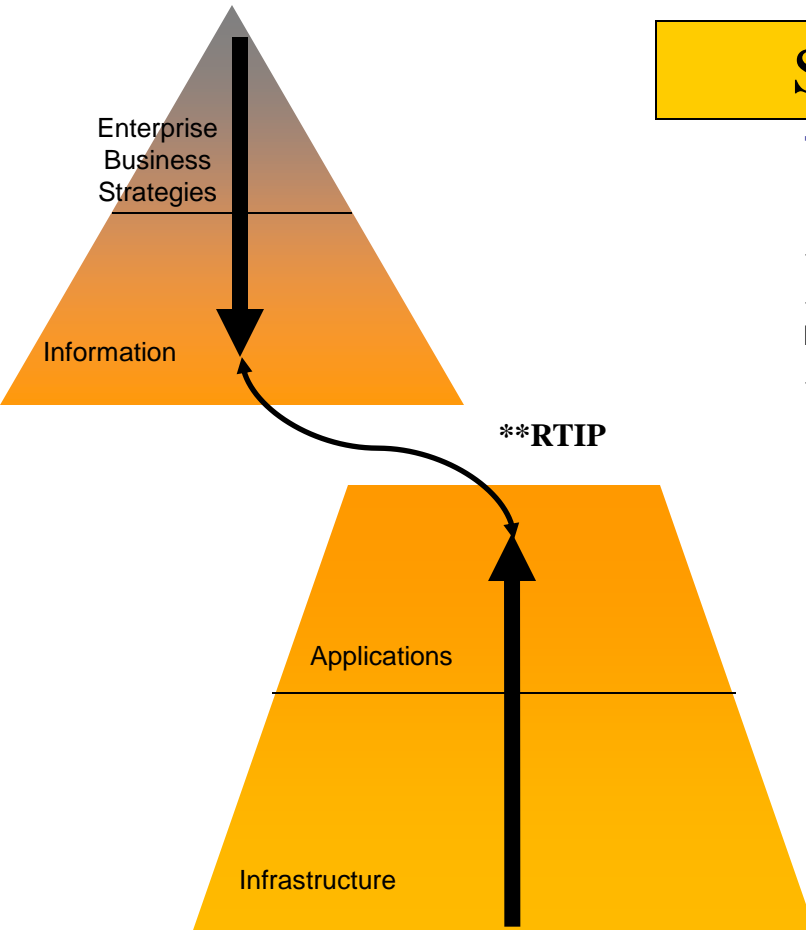
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## Agenda

- **Presentation**

# What is RTIP? (The Bridge Between Portfolio Management (PfM) and Project Management (PM) )



## Strategic (PfM)

**Top Down Portfolio Mgmt**  
(Doing the right Things)

- ✓ Senior Management Summary
- ✓ Budgets, Capacity, Milestones, Risks, Benefits, Prioritization, Selection, Oversight, Evaluation
- ✓ Models Management Decision Process

## Operational (PM)

**Bottom up Project Mgmt**  
(Doing things Right)

- ✓ Delivery of individual projects
- ✓ Organizational Detail

- \*\* Other Commonwealth Portfolio Reports include:
1. Quarterly Commonwealth Technology Portfolio Reports
  2. Quarterly IT Project Status Reports
  3. Quarterly List of Major IT Projects (DPB file)

Source: Artemis



## Development of 2018 DPB Portfolio

- Collect data from agencies in the Commonwealth Technology Portfolio (new projects and updates to projects identified in agency IT strategic plans)
- Evaluate projects based on Commonwealth CIO approved criteria
- Identify IT portfolio mix (1-n list)
- Conduct CIO review and obtain final approval for submission to the Governor and General Assembly



## Definitions of Investment Business Case and Project Initiation Approval

- **Investment Business Case (IBC) Approval**
  - Approved by the Commonwealth CIO
  - Indicates proposed project is an appropriate IT investment for the agency and Commonwealth and is selected into the agency IT Strategic plan and Commonwealth Technology Portfolio
  - Authorizes agency to expend funds to develop a project charter and prepare and issue an RFP
- **Project Initiation Approval (PIA)**
  - Builds on IBC documentation and approval
  - Approved by the Commonwealth CIO (*Code* requirement)
  - Signifies agency has adequately defined the project scope, schedule, and cost
  - Authorizes agency to expend funds on the project detailed planning
  - Agency can sign contracts resulting from RFP process
  - Project is designated as “active”



## January 2018 Quarterly DPB Report Summary

### Total Major IT Project Portfolio

#### (Projects = or > 1 million)

- **Total Number of Projects** = **53**
  - Number with Investment Business Case (IBC) approval = 25
  - Number with Project Initiation Approval (PIA) = 28
  
- **Total IBC Portfolio Value = \$333,889,404**
  
- **Total PIA Portfolio Value = \$362,732,200**
  
- **Total Portfolio Value = \$696,621,604**



# 2018 Funding Source – Projects Recommended for Funding (IBC)

Enterprise	Mandatory	Rank	Secretariat	Agency	Project Name	Funding	Enterprise	Mandatory	Rank	Secretariat	Agency	Project Name	Funding
		1	Public Safety & Homeland Security	VSP	SOR System Replacement	NGF			14	Health & Human Resources	VDH	Environmental Health Data Management Information System Project	Agency
X		2	Technology	VITA	Server/Storage Sourcing	VITA			15	Public Safety & Homeland Security	DOC	Inmate Phone & Tablet Services Project	NGF
		3	Finance	TAX	eGovernment Self Help Expansion My Virginia TAX	GF			16	Health & Human Resources	DBHDS	STEP-VA Same Day Access SPQM Implementation Project	GF
x		4	Technology	VITA	IT Infrastructure Services (ITIS) Program	VITA	x		17	Health & Human Resources	DBHDS	Kronos / Cardinal Payroll Project	GF
	x	5	Health & Human Resources	DMAS	Medicaid Enterprise System (MES) Program	Federal Split			18	Finance	TAX	Audit Case Management Mobile System	GF
x	x	6	Public Safety & Homeland Security	DCJS	Programs & Services Project	Federal Split			19	Public Safety & Homeland Security	DOC	Electronic Healthcare Records	GF
	x	7	Health & Human Resources	DMAS	MES Financial Management	Federal Split			20	Education	VSU	Implement Banner XE Project	Federal
		8	Education	NSU	Network Infrastructure Refresh	Agency			21	Education	DOE	IBC IEP System	Federal
		9	Health & Human Resources	DBHDS	Pulse Budget System Project	GF			22	Health & Human Resources	DSS	CCWIS - Program	Federal Split
		10	Health & Human Resources	DSS	CCWIS - Mobility	Federal Split		x	23	Health & Human Resources	DBHDS	DOJ - Licensing System	GF
		11	Health & Human Resources	DBHDS	ISP/VIDES Data Exchange Project	GF			24	Transportation	VDOT	PPM@VDOT	Agency
		12	Transportation	VDOT	CEDAR Upgrade Project	Agency			25	Public Safety & Homeland Security	ABC	VA ABC Financial System Replacement	Agency
		13	Health & Human Resources	DSS	Electronic Child Care Attendance Tracking and Payment Processing	Federal Split							



# 2018 Infrastructure Approach– Projects Recommended for Funding (IBC)

Infrastructure Approach	Rank	Secretariat	Agency	Project Name	Funding	Infrastructure Approach	Rank	Secretariat	Agency	Project Name	Funding
Remote Hosting	1	Public Safety & Homeland Security	VSP	SOR System Replacement	NGF	CESC	14	Health & Human Resources	VDH	Environmental Health Data Management Information System Project	Agency
Remote Hosting	2	Technology	VITA	Server/Storage Sourcing	VITA	Remote Hosting	15	Public Safety & Homeland Security	DOC	Inmate Phone & Tablet Services Project	NGF
CESC	3	Finance	TAX	eGovernment Self Help Expansion My Virginia TAX	GF	Remote Hosting	16	Health & Human Resources	DBHDS	STEP-VA Same Day Access SPQM Implementation Project	GF
Remote Hosting	4	Technology	VITA	IT Infrastructure Services (ITIS) Program	VITA	CESC	17	Health & Human Resources	DBHDS	Kronos / Cardinal Payroll Project	GF
Cloud	5	Health & Human Resources	DMAS	Medicaid Enterprise System (MES) Program	Federal Split	CESC	18	Finance	TAX	Audit Case Management Mobile System	GF
CESC	6	Public Safety & Homeland Security	DCJS	Programs & Services Project	Federal Split	CESC	19	Public Safety & Homeland Security	DOC	Electronic Healthcare Records	GF
Cloud	7	Health & Human Resources	DMAS	MES Financial Management	Federal Split	Remote Hosting	20	Education	VSU	Implement Banner XE Project	Federal
Remote Hosting	8	Education	NSU	Network Infrastructure Refresh	Agency	Remote Hosting	21	Education	DOE	IBC IEP System	Federal
CESC	9	Health & Human Resources	DBHDS	Pulse Budget System Project	GF	CESC	22	Health & Human Resources	DSS	CCWIS - Program	Federal Split
CESC	10	Health & Human Resources	DSS	CCWIS - Mobility	Federal Split	CESC	23	Health & Human Resources	DBHDS	DOJ - Licensing System	GF
Cloud	11	Health & Human Resources	DBHDS	ISP/VIDES Data Exchange Project	GF	CESC	24	Transportation	VDOT	PPM@VDOT	Agency
CESC	12	Transportation	VDOT	CEDAR Upgrade Project	Agency	Remote Hosting	25	Public Safety & Homeland Security	ABC	VA ABC Financial System Replacement	Agency
Cloud	13	Health & Human Resources	DSS	Electronic Child Care Attendance Tracking and Payment Processing	Federal Split						





## DPB Analysis January 2018 – Projects Recommended for Funding (IBC)

### Total Investment Business Case Value

**\$333,889,404**

#### Enterprise

- Enterprise Technology Projects and Projects with Statewide Application
  - Number = 4
  - Value = \$182,015,279
- Agency Projects
  - Number = 21
  - Value = \$151,874,125

#### Mandatory

- Mandatory Projects
  - Number = 4
  - Value = \$13,536,518

#### Portfolio Mix

- Run the Business
  - Number = 9
  - Value = \$132,446,416
- Improve the Business
  - Number = 11
  - Value = \$68,319,107
- Transform the Business
  - Number = 5
  - Value = \$133,103,881

#### Infrastructure Approach

- CESC
  - Number = 12
  - Value = \$70,944,698
- Cloud
  - Number = 4
  - Value = \$31,955,518
- Remote Hosting
  - Number = 9
  - Value = \$230,989,188



## 2018 Funding Source– Projects Recommended for Continued Funding (PIA)

Secretariat	Agency	Project Name	Funding	Secretariat	Agency	Project Name	Funding
Finance	DOA	Cardinal Payroll	Agency	Technology	VITA	Managed Security Services Project	VITA
Transportation	VDOT	Construction Documentation Management	Agency	Health & Human Resources	DMAS	MES Data Warehouse	Federal Split
Health & Human Resources	DSS	CRS - Central Registry System Phase 2	Federal Split	Health & Human Resources	DMAS	MES Encounter Processing	Federal Split
Commerce and Trade	VEC	Customer Portal - Integrated Registration	Federal	Health & Human Resources	DMAS	MES Fee for Service and Core Processing	Federal Split
Health & Human Resources	DSS	DCSE Document Management Software Project	Federal Split	Health & Human Resources	DMAS	MES Integration	Federal Split
Administration	DGS	DGS-DRES - COVA Trax Phase 2	Agency	Health & Human Resources	DMAS	MES Pharmacy Benefit Management	Federal Split
Transportation	DMV	DMV Project 2016: DMV Fuel Taxes Solution	Agency	Technology	VITA	Messaging Services Project	VITA
Transportation	DMV	DMV Project 2016: DMV IRP/IFTA/CView Solution	Agency	Technology	VITA	Multisourcing Service Integrator Services	VITA
Transportation	DMV	DMV Project 2017: REAL ID	Agency	Education	DOE	School Nutrition Programs Web-based System (SNPWeb)	Federal
Health & Human Resources	DBHDS	DOJ – Waiver Management System	Federal	Transportation	VDOT	SMART SCALE - SMART Portal Enhancements Project	Agency
Transportation	VDOT	Highway Maintenance Management System	Federal	Technology	VITA	Telecommunications Expense (Management) and Billing Solution (TEBS)	VITA
Education	JYF	JS Exhibit Renovation Technology	Agency	Commerce and Trade	VEC	Unemployment Insurance Modernization	Federal
Public Safety & Homeland Security	ABC	Licensing System Project	Agency	Public Safety & Homeland Security	ABC	VITA Off-Boarding Microsoft 365 eMail Project	Agency
Technology	VITA	Mainframe Services Project	VITA	Public Safety & Homeland Security	ABC	Web Redesign - Phase II	Agency



## 2018 Infrastructure Approach– Projects Recommended for Continued Funding (PIA)

Infrastructure Approach	Secretariat	Agency	Project Name	Infrastructure Approach	Secretariat	Agency	Project Name
CESC	Finance	DOA	Cardinal Payroll	Remote Hosting	Technology	VITA	Managed Security Services Project
Remote Hosting	Transportation	VDOT	Construction Documentation Management	Cloud	Health & Human Resources	DMAS	MES Data Warehouse
CESC	Health & Human Resources	DSS	CRS - Central Registry System Phase 2	Cloud	Health & Human Resources	DMAS	MES Encounter Processing
Cloud	Commerce and Trade	VEC	Customer Portal - Integrated Registration	Cloud	Health & Human Resources	DMAS	MES Fee for Service and Core Processing
	Health & Human Resources	DSS	DCSE Document Management Software Project	Cloud	Health & Human Resources	DMAS	MES Integration
Cloud	Administration	DGS	DGS-DRES - COVA Trax Phase 2	Cloud	Health & Human Resources	DMAS	MES Pharmacy Benefit Management
CESC	Transportation	DMV	DMV Project 2016: DMV Fuel Taxes Solution	Remote Hosting	Technology	VITA	Messaging Services Project
CESC	Transportation	DMV	DMV Project 2016: DMV IRP/IFTA/CView Solution	Remote Hosting	Technology	VITA	Multisourcing Service Integrator Services
CESC	Transportation	DMV	DMV Project 2017: REAL ID	CESC	Education	DOE	School Nutrition Programs Web-based System (SNPWeb)
CESC	Health & Human Resources	DBHDS	DOJ – Waiver Management System	CESC	Transportation	VDOT	SMART SCALE - SMART Portal Enhancements Project
CESC	Transportation	VDOT	Highway Maintenance Management System	CESC	Technology	VITA	Telecommunications Expense (Management) and Billing Solution (TEBS)
Remote Hosting	Education	JYF	JS Exhibit Renovation Technology	CESC	Commerce and Trade	VEC	Unemployment Insurance Modernization
CESC	Public Safety & Homeland Security	ABC	Licensing System Project	Cloud	Public Safety & Homeland Security	ABC	VITA Off-Boarding Microsoft 365 eMail Project
Remote Hosting	Technology	VITA	Mainframe Services Project	CESC	Public Safety & Homeland Security	ABC	Web Redesign - Phase II



## DPB Analysis January 2018 – Projects Recommended for Continued Funding (PIA)

### Total Project Initiation Approval Value

**\$245,018,224**

#### Enterprise

- Enterprise Technology Projects and Projects with Statewide Application
  - Number = 6
  - Value = \$ 84,344,711
- Agency Projects
  - Number = 22
  - Value = \$ 278,387,489

#### Mandatory

- Mandatory Projects
  - Number = 6
  - Value = \$ 214,649,323

#### Portfolio Mix

- Run the Business
  - Number = 9
  - Value = \$ 85,826,254
- Improve the Business
  - Number = 13
  - Value = \$ 126,806,705
- Transform the Business
  - Number = 6
  - Value = \$ 150,099,240

#### Infrastructure Approach

- CESC
  - Number = 15
  - Value = \$ 243,767,570
- Cloud
  - Number = 8
  - Value = \$ 82,333,478
- Remote Hosting
  - Number = 5
  - Value = \$ 36,631,151



## 2017 RTIP Appendices Points of Contact

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## 2017 Additional Definitions

- **Enterprise Applications & Projects** – Centrally administered applications which act as the authoritative source of data or processing for the Commonwealth.
- **Collaborative Applications, Services & Projects** – Business applications and services which provide organizations and/or political subdivisions the opportunity to work together, in a substantive, mutually beneficial relationship, with a common integrated solution.
- **Mandatory Projects** – Projects that support legal or regulatory requirements such as Executive Orders, state legislation, or Federal mandates
- **Operational Projects (Run the Business)** – A project portfolio category for projects that support business functionality, deliverables, or processes by correcting or modifying existing assets. These projects do not introduce new functionality.
- **Enhancements (Improve the Business)** – A project portfolio category for projects that support business functionality, deliverables, or processes by enhancing existing assets. These projects can introduce new processes.
- **Transformational Projects (Transform the Business)** – A project portfolio category for projects that support business functionality, deliverables, or processes by changing the way an organization does business.