

**Note: If ITIMD has notified your agency that your agency qualifies for ITSP Lite, before preparing your ITSP, contact your ITIMD consultant for further instructions.**

## **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 mission, 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 2026-28 biennium ITSP is to be submitted to the CIO of the Commonwealth by May 14, 2025. The plan is considered submitted once the designated agency head in the Commonwealth Technology Portfolio (CTP) has approved it in that application or has sent an email stating their approval to the agency's ITIMD consultant at VITA. Further detail explaining an email approval is mentioned later in this guidance.

New in 2025 to assist agencies in determining their current state; risks in the environment; areas of improvement that need to be called in the agency ITSP is the digitized Agency Data Dashboard or RxITSP application. This application is a series of centralized dashboards that presents to agencies all the most current information VITA has pertaining to the agency current IT environment with VITA recommendations.

## **What is the Business Value of IT?**

Agencies shall develop an IT plan in support of their business plan for the next 6 years or three budget cycles recognizing that the implementation of many IT investments can extend beyond a budget cycle and in many cases an administration. Demonstration of how the IT plan supports the business progression from the current state to the desired future state is essential in a well thought out IT strategic plan.

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 (includes internal as well as external customers)
- 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
- resolving technical debt
- modernizing existing applications

### 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 measures. 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. IT Projects that align with Business Requirements for Technology
5. 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/agency-it-strategic-planning>.

## 1. IT Summary Section of the Agency IT Strategic Plan

The purpose of the IT Summary Section of the IT Strategic Plan is to demonstrate how the IT plan supports the business progression from the current state to the future state as well as to discuss how the IT investments support the mission, goals and objectives of the agency and the Commonwealth.

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

Business requirements for new or existing technology, IT projects or procurements to be procured or implemented during the next 6 years are to be discussed with an emphasis on how these business requirements and investments support the business environment.

Guidance for completing the IT Summary in CTP is provided in the [IT Summary Job Aid](#), located on the VITA website. A description of each section is provided below. The IT Summary Section consists of four sections:

### Agency Mission, Goals, Objectives, Pain Points

In this section, the agency will update the agency's mission, goals, objectives and pain points.

### Current IT State

To make collecting the information easier for the agency and to ensure data quality and consistency in support of required data analytics, this section has been reworked to ask specific targeted questions

The agency focus in the upcoming ITSP should discuss how it plans to address technical debt, specifically Application Modernization. In January 2025, agencies were directed to analyze and score the health of their applications and create a list of prioritized investments (1 to n list). The top applications that need to be addressed should be clearly discussed in this section, along with efforts to resolve issues to meet agency business needs. Agencies should list applications that need modernizing, prioritized by need, and include estimated budget expenses to do so. While the list of prioritized applications should extend out for six years of planning, estimated budget expenses to do so should only be for the upcoming biennium, i.e., July 1, 2026 – June 30, 2028.

In addition, any pain points not addressed by the agency's 1 to n list should be documented along with a high level plan of action. Include all enhancement opportunities, even those that are not currently funded, and focus on the business value of improving the IT agency performance. Please note whether the proposed enhancements are funded. Remember, a Business Requirement for Existing Technology (BReT) must be entered into the CTP to document the remediation efforts.

**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 or replacement 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.*

### External Factors Impacting IT

In this section, agencies describe changes to their business environment from external entities that will require/ mandate changes to their existing business requirements or IT investments. These are requirements and/or mandates from external sources to which agencies must comply, conform, or react and have no control over what must be done or when it must be done. These external sources can be other agencies or business partners, , product and service providers, new federal or state legislation, judicial mandates or other regulatory bodies.

The agency must explain the business reason for the change, any important deadlines that must be met, and the consequences if the deadlines are not met. In the description, 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.

**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.*

### Future IT Solutions

In this section, regardless of whether funded or not, the agency will describe the business value of future IT solutions or investments that support strategic objectives for the agency, secretariat, or Commonwealth. In this section, discuss how the IT investments support the agency's business plan. Again, in your discussion, be sure to note whether these needed future solutions are funded or not. Each requirement must have a corresponding BRnT entered into CTP.

**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 Future IT Solutions, 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**

The IT Budget Estimation Tables are used to convey what the agency's estimated costs for its 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.

A description of each section is provided below.

All in-scope agencies must fill out the Current IT Services and Future IT Solutions 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 already included in the Current IT Services table in Projected Service Fees. Solution requests

that support IT projects are included in the appropriate project cost row in the Future IT Solutions 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:

<b>Estimating the Agency IT Staff Cost for the Previous Year</b>		
<b>Step</b>	<b>Action</b>	<b>Cost</b>
<b>1</b>	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 Future IT Solutions table.	
<b>2</b>	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 Future IT Solutions table.	
<b>3</b>	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 Future IT Solutions table.	
<b>4</b>	Subtotal costs identified in Steps 1, 2, and 3.	
<b>5</b>	Multiply the subtotal from Step 4 by 1.28. This represents the average cost of benefits for personnel.	
<b>6</b>	Sum all IT-related training costs not included in an IT project budget (including tuition, books, fees, etc.).	
<b>7</b>	Sum all IT-related travel costs not included in an IT project budget (including gas, mileage, accommodation, fares, etc.).	
<b>8</b>	Total costs identified in Steps 4, 5, 6, and 7. This represents the estimated base Agency IT Staff costs for the previous year.	
<b>9</b>	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.	
<b>10</b>	Determine how much of the Agency IT Staff costs identified in Step 9 will be funded from general fund dollars.	
<b>11</b>	Determine how much of the Agency IT Staff costs identified in Step 9 will be funded from non-general fund dollars.	

Estimating the Agency IT Staff Cost for the Previous Year		
Step	Action	Cost
<b>12</b>	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.	
<b>13</b>	Determine how much of the Agency IT Staff costs identified in Step 12 will be funded from general fund dollars.	
<b>14</b>	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.

### ***Future IT Investments Table***

Future 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 future 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 Future IT Solutions 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.

Future IT Solutions				
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 Future IT Solutions 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 Future IT Solutions Table by the agency. Refer to the end of this section for the process steps to transfer the Major IT Project Totals into the Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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 Future IT Solutions 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

Manage Ribbon Tiles: Strategy View

Available Tiles

Search available tiles...

- BRTs\_with\_Items
- COVA Monthly Status Report (WRK14)
- Financial Analysis (STR31)
- Financial Burdown Comparison (STR32)
- IT Strategic Plan Status (STR16)
- ITSP Project Procurement Funding
- Milestone Status (WRK15)
- Milestone Trend Analysis (CTR02)

Display

- Strategy Detail
- Active Lifecycle Steps
- ITSP\_Summary
- ITSP\_BudgetTables22
- Budget Tables2224
- ITSP\_Agency\_BRTs
- ITSP\_Projects
- ITSP\_Procurements

Drag & Drop

Reset to Default Settings

Cancel Save

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

Planview Enterprise One

My Overview Timesheet Requests Work Resources Outcomes Strategies Planning more ...

Program/ITSP 136 VITA FY20-22 ITSP View Strategy View

Overview Investment Dependencies Schedule Associated Work IT Strategic Plan

Strategy Detail Active Lifecycle Steps ITSP\_Summary ITSP\_BudgetTables22 Budget Tables2224 ITSP Project Procurement Funding ITSP\_Agency\_BRTs ITSP\_Projects ITSP\_Procurements more ...

Save Parameters ☒ Apply to all strategies. ☐ Export Only Create Subcat

Select ITSP Project Procurement Funding tile

Expand View Report feature by selecting arrow

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

AgencyCode: 136 Virginia IT Agency (VITA)

ITSP Project / Procurement Funding

1 of 2 ? Find | Next

## ITSP Project / Procurement Funding

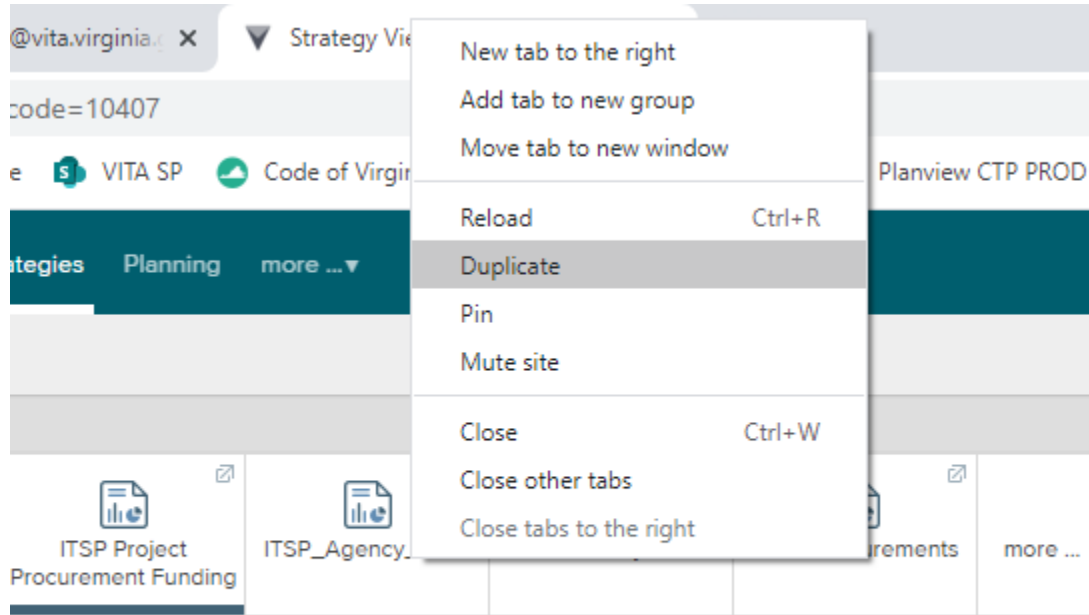
### Major Projects

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	
	<b>Totals</b>		<b>\$12,800,000.00</b>		<b>\$20,900,000.00</b>	

### Non-Major Projects

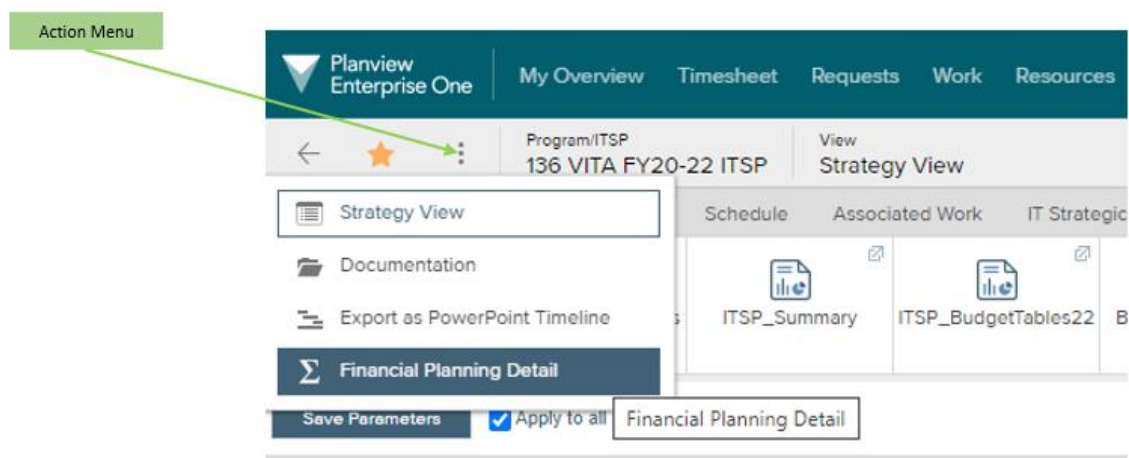
136 Virginia T Agency (VITA)	Project Title	Total Cost	GF 23	NGF 23	GF 24	NGF 24
	EO19_VITA_Aggregate Rehost	\$655,500.00				
	EO19_VITA_AIS Oracle Physical Servers	\$800,000.00				
	EO19_VITA_JSP Imaging_Repurchase	\$92,000.00				
	Mainframe Strategy	\$880,000.00				
	MSI Data Center Architectural	\$973,213.00				

- Duplicate the tab on your Internet browser



## Transfer expense totals to ITSP Financials 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.

The screenshot shows the 'Financial Planning Detail' form. At the top right, there is a teal header bar with a user icon and a close button. Below this, a 'Version' dropdown menu is set to 'Actual/Forecast (forecast)'. A green callout box labeled 'Top Right Corner' points to this area. The main form area contains the following sections:

- Financial Planning Model**  
COV Financial Model
- Working Version**  
Actual/Forecast (forecast) (dropdown menu)
- Display Variance with Comparison Version**  
Off (selected) | On
- Comparison Version**  
Actual/Forecast (forecast) (dropdown menu)
- Apply** button
- Excel** and **Manage Plan** buttons at the bottom.

Two green callout boxes provide instructions: 'Top Right Corner' points to the version dropdown, and 'Use DropDown menu to select Actual/Forecast (forecast) version' points to the 'Working Version' and 'Comparison Version' dropdowns. The background shows a grid with row numbers 3 and 028.

- 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 Future IT Solutions 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

Version  
Actual/Forecast (forecast) ▼

Enter text to filter grid

2021 2022 2023 2024 2025 2026 2027 2028

**Financial Plan Preferences**

**Viewable Range**

☐ Planning Horizon (Jul 2015 To Jun 2030)  
☐ Encompass schedule and cost (Jul 2015 To Jul 2015)  
☒ Custom periods Jul 2022 ▼ To Jun 2024 ▼

**Show Totals**

☒ Quarter  
☒ Year  
☐ Actuals/Forecast

Cancel Save

Select wrench icon

Select Custom periods  
Set date range for the fiscal years of the biennium; e.g., 7/1/2022 to 6/30/2024

▼ 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

136 Virginia IT 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	
	<b>Totals</b>		<b>\$12,800,000.00</b>		<b>\$20,900,000.00</b>	

### Non-Major Projects

136 Virginia IT 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_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 136 VITA 2022-24 ITSP		View Financial Planning Detail				
Detail ▾		All Available Account Lines ▾		Currency	Effort	FTEs
				Focus Control	Add a Line	
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					

- 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
Future IT Solutions:	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

To see additional screen shots for completing the IT Budget Estimation Tables in CTP is provided in the [IT Financial Screen Job Aid](#), located on the VITA website.

### 3. Business Requirements for Technology and IT Investments

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

Agencies must document all Business Requirements for Technology (i.e., BRnTs and BReTs), 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. Make sure dates are updated, particularly BRTs, project/procurement start and end dates.

An agency's Business Requirements for Technology and IT Investments in CTP should align to the agency's service areas as well as to commonwealth goals and objectives. In addition, they provide details, including costs, start and end dates, service area owner, funding status. This detail is entered by the agency in 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 consult the CTP – Planview Portfolios section on the [Commonwealth Technology Portfolio webpage](#) on the VITA website.

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.

If a project is planned to start in the upcoming biennium, particularly in the first year, enter the following:

- BRT
- IBC (AITR, Agency Head, and Commonwealth CIO approval are required)

If a project is planned to start in year 2 through 6, enter the following:

- BRT

If a procurement is planned to start in the upcoming biennium, particularly in the first year, enter the following:

- BRT
- PGR (AITR approval only. Agency Head approval is required when it is time to procure.)

If a procurement is planned to start in year 2 through 6, enter the following:

- BRT

## 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. BRTs apply to all investments regardless of cost. Analysis of BRTs feeds into demand management and allows VITA to determine future needs for agencies as well as identification of enterprise/collaborative opportunities. 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 function (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 Future IT Solutions – Estimated Costs for Projects and New IT Investments table in the IT Budget Estimation Tables by the agency. It is important to include these amounts for a comprehensive understanding of projected total Commonwealth IT spend for executive branch agencies.**

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 Future IT Solutions – 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.

## 4. 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. The ITSP is considered submitted once the agency's ITSP has been approved by the agency head in CTP, or when an email from the agency head to [itimd@vita.virginia.gov](mailto:itimd@vita.virginia.gov) or to the agency's CAM has been received. If the agency head does not have access to CTP, either they can send an email to [itimd@vita.virginia.gov](mailto:itimd@vita.virginia.gov) or to their agency's CAM acknowledging their approval of the ITSP. Or the AITR can send the email acknowledging the agency head's approval, but must cc: the agency head on the communiqué.

If the AITR does not have access to CTP, they can acknowledge their approval of the ITSP similarly, however their acknowledgment of approval must occur before or at the same time as the agency head's acknowledgment of approval.

AITRs should consult with their agency's CAM with any questions or clarification.

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

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 a 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.