Commonwealth IT Investment Management (ITIM)

Transforming the Portfolio Intake Process - Introduction

Constance Scott
IT Investment Management Division
Virginia Information Technology Agency

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Agency Benefits

- Addresses agencies need to capture valid long term business needs before it can be determined what type of investment is needed.

- Separates identification of business needs from establishment of specific technology investments.

- Integrates IT strategic planning in single application.
  - Allows pre-population of proposed investment table.

- Improves ITIM process alignment with Relationship Management & Governance.
  - Promotes early review and involvement from VITA governance (PMD, ITIMD, EA, Security, SCM) to avoid last minute governance issues.

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Agency Benefits (continued)

- Allows identification of enterprise collaboration opportunities and provides data to strengthen the case for group funding.

- Captures critical maintenance activities to avoid underfunding support of ongoing applications.

- Supports incorporation of statewide IT infrastructure “roadmap” projects. (multiple agencies, stronger resourcing)

- Clarifies role of AITR in documenting business needs and maintaining agency technology portfolio
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How Can VITA Get Involved EARLIER in the Process?

- **Commonwealth Strategic Planning Process**
- **Business Plans & Needs**
- **Pre-Select**
- **Evaluate**
- **Select**
- **Control**

- What proposed IT investments potentially solve business needs? BRTs
- Which IT investments best meet the business needs? ITSP
- Are the selected IT investments performing as planned during implementation? PMI – project Governance; PGR
- Did the selected IT investments deliver the expected business value? CETR
- Investment Results

How Can We Help Agencies Create a Useful IT Plan to Manage Against

Technology may provide a solution. Examples of minimal information an agency would need to supply for a BRT are:
- Size
- Impact
- Mandate
- Strategic alignment
- Business value
- PHI data (if any)

Enter Business Needs. Technology solution are unknown at this stage.

Enter Maintenance Requirements

Examples are:
- Release upgrades
- Security issues
- Obsolete technology

Technology solutions may be associated with these requirements.

ITIMD to perform PfM analysis for:
- Risk
- Operational
- Security
- Opportunities for Enterprise/Collaboration

BRTs (Business Rats for Tech)

BRT approval process based on completeness.

CAMs work with agencies, EA, Security, & the Roadmap to identify BRTs. BRTs become a new section in the IT strategic plan.

Type of Investment?
Investment approval process remains mostly the same, except that Projects, Programs and Procurements must align back to a BRT to gain approval.
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Portfolio-Level Analysis of BRTs

The inclusion of BRTs in CTP (along with investments) will allow us to analyze agency-level, Secretariat-level, and Commonwealth-level:

- **Risk**
  - Operational
  - Security

- **Opportunities for Enterprise solutions/Collaboration earlier in the process**
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ITIM Pre-select (Identify) Phase

- Business Requirements for Technology (BRTs)
  - Business focused description of Agency need for technology investment
  - References Agency Strategic Plan
  - Requires a Target Business Value of IT (BVIT)
  - Must have at least one BRT for each grant submission that will impact Agency IT
  - Entered into CTP from Agency or from CETR

ITIM Evaluate Phase

- Commonwealth Enterprise Technology Repository (CETR)
  - IT Operations and Maintenance Inventory system for all Agency IT assets
  - Captures Costs, Enterprise Architecture, Information Security, and IT Risk Management characteristics

ITIM Select Phase

- Agency Strategic Plans
  - IBCs are used for projects and programs
  - Prioritized at both the Agency and Enterprise level by comparing Value vs Risk
  - Technology focused
  - Clearly identifies how BVIT will be realized
  - Includes anticipated measurable business performance improvements

- Service Requests (SRs)
  - PGRs
  - IT Programs
  - IT Projects
  - NG Work Requests
  - VITA Services

- Investment Business Cases (IBCs)
  - Five areas of control
  - Each has a different Enterprise procedure or standard for ensuring success

Implementation Methods
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AITRs document BRTs (BRETs and BRNTs) and responses to OR/I's

BRT
- BRET
- BRNT

OR/I Responses

BRTs

Approved BRTs and OR/I responses

Agency Head approves BRTs and OR/I responses

Pre-select Phase

Evaluate Phase

Operational IT Assets

Agency assessment of how well technology enables business performance

Select Phase

Control Phase

Current project

Investment Initiation Form

PMD evaluates IBCs and works with AITRs to select projects and/or procurements

CIO of the Commonwealth approves recommended projects and procurements via agency ITSP

Proposed project

Agency executes projects and procurements

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Contact Information

Constance Scott
constance.scott@vita.virginia.gov
(804) 416-6179

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