



COMMONWEALTH of VIRGINIA

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MEMORANDUM

TO: Jim McGuirk, Information Technology Investment Board Chairman

FROM: Lem Stewart, Chief Information Officer of the Commonwealth

SUBJECT: Agency Strategic Planning Timeline and Impact on the 2007 Recommended Technology Investment Projects Report

As you know, data gathering for the annual Recommended Technology Investment Projects (RTIP) Report is conducted as part of the agency strategic planning process, which includes IT strategic planning. The underlying premise of this process is that IT must support agency strategic goals and objectives and that an agency strategic business plan must be in place before an effective IT plan can be developed. The agency strategic planning process is managed by the Department of Planning and Budget (DPB) and incorporates IT strategic planning guidance developed by VITA under the direction of the Information Technology Investment Board (ITIB).

VITA has been informed by DPB that strategic planning guidance for the upcoming budget biennium will not be issued to agencies until sometime in early to mid-June. Agencies have been instructed by Governor Kaine to meet with their Secretariats to review their plans in a series of meetings that will be conducted this summer. The final due date for agency plans will be in the August or September timeframe. Because agencies will not have had the opportunity to complete their strategic business plans and fully determine their IT investment needs, the listing of major IT projects to be recommended for funding in the 2007 RTIP Report scheduled to be presented to the ITIB at the July meeting may not reflect the final listing of all proposed agency IT projects.

My recommendation is to proceed with the planned July review of a preliminary project list and to deliver the RTIP Report on September 1 as required by the *Code of Virginia*, taking this opportunity to highlight to the Governor and General Assembly the historical problem with the timing of a September 1 reporting date that often is out of sync with the Commonwealth strategic planning and budgeting cycle. The September 1 report also would announce the ITIB's intent to provide an updated recommended projects list following the October ITIB meeting, bringing the report in sync with completion of agency strategic planning and budget preparation.

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As evidenced at the ITIB meeting this past April, the implementation of a new Commonwealth portfolio management system, ProSight, has made it possible to provide quarterly portfolio updates for major IT projects that incorporate information from key events in the Commonwealth strategic planning and budgeting cycle into the portfolio reporting process. The following is a schedule of the events and the information provided:

- July – Preliminary assessment of projects to be recommended in the annual RTIP Report
- October – Confirmation of proposed funding for recommended projects from budget decision packages submitted to DPB
- January – Confirmation of projects included within the Governor's budget
- April – Confirmation of project funding within the Appropriation Act

The quarterly review by the ITIB of the Commonwealth investment portfolio, with a focus on major IT projects, should facilitate preparation of future annual RTIP Reports, with the 2007 RTIP Report highlighting the need for a possible adjustment in the reporting date to late October or early November.

Please let me know if this meets your approval or if changes are desired.

LCS/cs

c: Jerry Simonoff, Director IT Investment and Enterprise Solutions
Dan Ziomek, VITA Project Management Division
ITIB Members
Marcella Williamson, Executive Director, ITIB