STATEWIDE PROCEDURE

ENTERPRISE information services

NUMBER	SUPERSEDES
107-004-180_PR	IT Project Prioritization: An Agency Instruction Guide (2025-2027)

EFFECTIVE DATE	PAGE NUMBER
	Pages 1 of ____
REVIEWED DATE	

Division	**REFERENCE**
Enterprise Information Services (State CIO)	ORS 276A.203 SB 1090 (2025) Statewide Policy 107-004-180: Information Technology Funding
Policy Owner Administrative Services	
SUBJECT Information Technology Funding	**APPROVED SIGNATURE** _____ Terrence Woods, State Chief Information Officer

PURPOSE

This procedure outlines tasks of Executive Branch agencies to comply with Statewide Policy 107-004-180 (Information Technology Funding) when requesting IT budget or IT project funding, participating in prioritization and contributing to statutory reporting.

APPLICABILITY

See the Information Technology (IT) Funding Policy (107-004-180) for applicability of this procedure.

FORMS/EXHIBITS/INSTRUCTIONS

Attachment A: Request/prioritization workbooks
Attachment B: Prioritization business case template (https://www.oregon.gov/eis/project-portfolio-performance/Documents/eis-p3-business-case-template-v4.docx)
Attachment C: Transmittal form
Attachment D: IT Budget category descriptions

DEFINITIONS

Refer to the IT Funding Policy (107-004-180).

PROCEDURE

IT Project Requests

RESPONSIBILITY	STEP	ACTION
Assistant State Chief Information Officer (ASCIO) / Senior IT Portfolio Manager (SIPM)	1.	ASCIO/SIPMs deliver presentations to policy areas regarding IT funding policy and procedure.
Agency	2.	Meet with SIPM on IT project requests alignment with EIS Strategic Framework and agency IT strategic plan. Meet with ASCIOs on all other IT funding requests alignment with EIS Strategic Framework and agency IT strategic plan. Submit draft request for IT budget and IT project(s) exceeding $[TBD] to XXX@eis.oregon.gov by April 30 of each even-numbered year. The request must be accompanied by a draft prioritization business case for each IT project exceeding $[TBD].
ASCIO/SIPM	3.	Meet with agencies to provide and discuss feedback on IT budget request(s), IT project request(s), and draft business case(s).
Agency	4.	By June 1 of even-numbered year, submit updated request/prioritization workbook (Attachment A) to XXX@eis.oregon.gov. Updated workbooks may address feedback from EIS. Updated workbooks may not include new requests not already identified in the draft request. Upload updated prioritization business case(s) (amended prioritization business case for continuing investments) in the Project Portfolio Management (PPM) system. Submit new project investments as an "idea". Submit continuing project investments in a folder labeled "project prioritization". Note: Agencies without access to the PPM system should work with the SIPM.
SIPM/ASCIO	5.	Meet with agency to discuss prioritization scoring differences.
SIPM	6.	Develop recommended prioritization of agency IT project requests. Develop recommended prioritization of policy area IT project requests.

RESPONSIBILITY	**STEP**	**ACTION**
		Develops recommended prioritization of executive branch IT project requests.
ASCIO	7.	ASCIO develops recommended prioritization of policy area and executive branch IT budgets
ASCIO / SIPM	8.	Deliver recommendations to State CIO.
State CIO	9.	Make determination of recommended priorities.
		Deliver statutory report to Governor's Office and Joint Legislative Committee on Information Management and Technology.
		Distribute statutory report to agency IT leadership.

Attachment C: Transmittal Form

Date:

To: Enterprise Information Services

From: [Agency Name]

RE: Agency IT budget and IT project funding requests for 20##-## Biennium

I hereby certify that the accompanying IT budget and IT project funding requests have been reviewed and approved by appropriate agency IT leadership and agency head.

_____
Signature of agency IT leadership

_____
Name of agency IT leadership

_____
Signature of agency head

_____
Name of agency head

Attachment D: Budget category descriptions

ORBITS Budget Category	R*STARS Comptroller Object	Description (Oregon Accounting Manual Chart of Accounts)
Personnel Services (3###)	3###	Salaries, wages and benefits paid to state employees.
Telecommunications (4200)	Telecom / Voice Usage (4301)	Charges for basic telephone services for land and wireless phones, cell phones and pagers.
	Telecom / Voice Maintenance (4303)	Charges for equipment installation, maintenance and repair service for voice equipment whether wireless or wired.
	Telecom / Network Services (4305)	Charges for data transport including network (WAN and LAN) charges and network connections. Include both wireless and wired lines.
	Telecom / Network Support (4307)	Charges for services to support the network (wired and wireless) including installation, maintenance and repair of equipment.
	Telecom / Wireless Public Safety (PS) Usage (4310)	Charges for use of public safety wireless communications which uses radio or microwave transmission. Primary use is by State Police, ODOT, OEM, and Forestry.
	Telecom / Wireless PS Support (4312)	Charges for services for installation, support or repair of Public Safety wireless communication network.
	Telecom / Teleconference Usage (4315)	Charges for audio and video teleconference services.
	Telecom / Teleconference Support (4317)	Charges for installation, repair or maintenance of teleconferencing equipment.
Data Processing (4200)	Computer Technology Mainframe Support (4357)	Charges for installation, maintenance and repairs to mainframe tangible devices and for mainframe software support.
	Computer Technology Server Support (4362)	Charges for installation, maintenance and repairs to the non network (WAN or LAN) server.
	Computer Technology PC Support (4367)	Charges for installation, maintenance agreements and repair services for PC.
	Computer Technology Peripheral Support (4371)	Charges for installation, maintenance or repair services for printers and peripherals.
	Computer Technology Computer Processing (4375)	Charges for computer use. Service fees for computing, e.g. DAS computing charges for database use or data mart use.
IT Professional Services (4315)	Professional Services / Network (4510)	Charges for personal services contracts for development of a network including analyzing, designing, implementing a WAN or LAN network.
	Professional Services / Wireless Public Safety (4511)	Charges for consultants for analyzing, designing, implementing or supporting the wireless network used for public safety.

ORBITS Budget Category	R*STARS Comptroller Object	Description (Oregon Accounting Manual Chart of Accounts)
		Primary users are ODOT, OEM, Forestry, and Oregon State Police.
	Professional Services / Teleconference (4512)	Charges for consultants for development and support of teleconferencing.
	Professional Services / Application New (4513)	Applications are programs running on software designed to allow the end user to perform a particular task or to provide direct business support to users.
	Professional Services / Application Modifications (4514)	Charges for modifications to an existing application done primarily to add new functionality. Applications are programs running on software designed to allow the end user to perform a particular task or to provide direct business support to users.
	Professional Services / Application Maintenance (4515)	Charges for maintenance or repair of existing applications when primary purpose is to continue existing operation of application rather than add significant new user functionality.
	Professional Services / Servers (4516)	Charges for consultants for Web-servers, database servers, and storage servers and other servers not used for WAN or LAN servers.
	Professional Services / IT Security (4517)	Charges for IT security. Consultants working on IT security projects. Contractors performing vulnerability assessments, risk assessments, services to mitigate risks, planning and other security tasks.
	Professional Services / IT Quality Assurance (4518)	Charges for contract payments to vendors for quality assurance services for IT projects.
	Professional Services / Managed Service Provider (4519)	Charges incurred under Managed Service Provider contracts.
	Professional Services / IT Quality Control (4520)	Payments for professional services / IT quality control.
IT expendable property (4715)	Telecom / Voice Equipment Rental (4302)	Charges for rental of voice equipment both wired and wireless.
	Telecom / Network Services (4305)	Charges for data transport including network (WAN and LAN) charges and network connections. Include both wireless and wired lines.
	Telecom / Network Equipment <$5k (4306)	Charges for purchase of network (WAN and LAN) equipment. Include both wireless and wired equipment.
	Telecom / Wireless PS Equipment <$5k (4311)	Charges for purchase of equipment for public safety wireless network including: Equipment for line of site communications, microwave towers.

ORBITS Budget Category	R*STARS Comptroller Object	Description (Oregon Accounting Manual Chart of Accounts)
	Telecom / Teleconference Equipment <$5k (4316)	Charges for teleconferencing equipment.
	Computer Technology Mainframe Equip <$5k (4354)	Charges for purchase of mainframe computers and equipment. Mainframe computers include mini and midi computers and all other "boxes" not used as a networked servers or PCs.
	Computer Technology Mainframe Equipment Rental (4355)	Charges for rental of mainframe computers and equipment. Mainframe computers include mini and midi computers and all other "boxes" not used as a networked servers or PCs.
	Computer Technology Mainframe Software <$5k (4356)	Charges for mainframe software and licenses.
	Computer Technology Server Equipment <$5k (4360)	Charges for server – tangible device or hardware. Include all devices whose primary use is a server other than a network WAN or LAN server. Include wireless and wired equipment.
	Computer Technology Server Software <$5k (4361)	Charges for purchase of software and licenses used to operate non network (WAN or LAN) servers.
	Computer Technology PC Equipment <$5k (4365)	Charges for purchase of Personal Computers, laptops, and parts when the unit price is under $5,000.
	Computer Technology PC Software <$5k (4366)	Charges for software and software licenses for desktop applications and PC operating systems.
	Computer Technology Peripheral Equipment Rental (4370)	Charges for the rental of peripherals including printers, plotters, scanners, non-mainframe storage devices, UPS (universal power supplies).
	Computer Technology Peripheral Equipment <$5k (4372)	Charges for the purchase of peripherals including printers, plotters, scanners, non-mainframe storage devices and UPS (universal power supplies).
Other services and supplies (4###)	4###	Charges for other services and supplies beyond the specified ORBITS IT budget categories.
Telecommunications equipment (5150)	Telecom / Voice Equipment >$5k (5200)	Charges for purchase of voice equipment and charges related to its acquisition.
	Telecom / Network Equipment >$5k (5201)	Charges for purchase of network (WAN and LAN) equipment. Includes certain capital rent and lease agreements. Includes both wireless and lines whose cost is more than $5,000.
	Telecom / Wireless PS Equipment >$5k (5202)	Charges for purchase of Public Safety wireless equipment and charges related to its acquisition whose cost is more than $5,000.

ORBITS Budget Category	R*STARS Comptroller Object	Description (Oregon Accounting Manual Chart of Accounts)
		This category is typically used by ODOT, OSP, OEM, Forestry and other agencies relying on the wireless relay.
	Telecom / Teleconference Equipment >$5k (5203)	Charges for purchase and acquisition of audio and video teleconferencing equipment and charges whose cost is more than $5,000.
	Telecom / Installation Services >$5k (5205)	Charges for services related to telecom installations whose cost is more than $5,000.
Data processing software (5550)	Information Technology Network Software >$5k (5300)	Charges for network (WAN and LAN) software licenses. Includes both wireless and line.
	Information Technology Mainframe Software >$5k (5301)	Charges for mainframe software license whose cost is more than $5,000.
	Information Technology Server Software >$5k (5302)	Charges for purchase of "non-network" server software and licenses.
	Information Technology PC Software >$5k (5303)	Charges for PC software and licenses.
	Information Technology Software Services (5305)	Charges related to IT software services.
Data processing hardware (5600)	Computer Technology Mainframe Equipment >$5k (5350)	Charges for purchase of mainframe computer devices and equipment. Mainframe computers include mini and midi computers and all other "boxes" not used as a server and not a PC.
	Computer Technology Server Equipment >$5k (5351)	Charges for purchase of non network servers. Includes those used to support both wireless and line equipment whose cost is more than $5,000.
	Computer Technology Peripheral Equipment >$5k (5352)	Charges for printers, plotters, and peripherals including scanners, printer combination machines when primary purpose is IT related.
	Computer Technology Installation Services >$5k (5355)	Installation cost for IT equipment if invoiced or provided separately from purchase cost whose cost is more than $5,000.
Other capital outlay (5###)	5###	Charges for other capital outlay beyond the specified ORBITS IT budget categories.