

# *2025-27 Enterprise IT Project Prioritization & Budget Instruction Frequently Asked Questions*

## What is IT Project Prioritization and what is its purpose?

Every two years agencies identify the major IT initiatives that will need funding as part of their agency biennial budget. Per [DAS Budget Instructions](#) agencies must submit documentation to Enterprise Information Services (EIS) for all new and continuing IT investments (projects) with a total cost of \$1,000,000 or greater, regardless of fund source or IT policy option package inclusion. Agencies also prioritize these projects based on established prioritization criteria. EIS evaluates this information and provides analysis to state decision-makers to assist in understanding agency IT investments, specifically:

- General understanding of agency major IT projects, their purpose and intended outcomes for all policy areas
- Evaluation of alignment with the Governor's priorities, enterprise strategies, and agency strategies
- Assessment of agency readiness and capability to implement these projects

## What projects are subject to the IT Project Prioritization process?

- New IT projects over \$1 million with a 2025-27 funding request (regardless of fund source)
- Continuing IT projects over \$1 million with a 2025-27 funding request (regardless of fund source)<sup>1</sup>

## What is the process and what documentation must be submitted?

Reach out to your assigned policy area Senior IT Portfolio Manager (SIPM) as your primary point of contact. You can find your assigned SIPM on our [About Us](#) webpage. Agencies are required to submit the following documentation to EIS within the PPM portal:

- Business case for each project (for continuing projects an addendum to the business case may be requested in lieu of a new or updated business case – talk with your SIPM about what should be included)
- Project Prioritization Matrix

For agencies with 50 FTE or more, provide your Agency IT Strategic Plan within the Special Reports section of the Agency Request Budget document.

Further information on the project prioritization process and document templates are available on our [Guidance and Forms](#) webpage.

## What should be included in a project business case?

EIS provides a template business case on our [Guidance and Forms](#) webpage. The business case should clearly describe how the project:

- Aligns with and supports agency business and IT strategic plans
- Aligns with racial equity vision, goals and objectives outlined in the [Diversity, Equity, and Inclusion \(DEI\) Action Plan: A Roadmap to Racial Equity and Belonging for the State of Oregon](#)
- Aligns with and supports the [Governor's goals, priorities and initiatives](#), the [EIS Strategic Framework](#), [Oregon's Cloud Forward Framework](#), [Oregon's Data Strategy](#), and the [EIS Modernization Playbook](#)
- Supports the scores and analysis represented within the IT Project Prioritization Matrix

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<sup>1</sup> Continuing projects drawing upon funds granted in prior biennia do not need to come through prioritization again.

## What should be included in an addendum for a continuing project?

For continuing projects an addendum may be requested in lieu of a new or updated business case. The addendum can be in whatever format you choose. It should cover the following topics and is intended to be a companion to the business case and provide an update from the time the project was initiated until now.

- What is status and health of the project (include budget and schedule baselines and any current challenges)?
- What has occurred since the project was initiated (include any change in approach or re-baselines)?
- How is the project funded (include, any federal or other funds relied upon and approvals to access funding)?
- What was accomplished with funds from last biennium (2023-25)?
- Why do funds need to be extended or expanded into 2025-27?
- What is expected to be accomplished in 2025-27 with the requested funds?

## When do materials need to be submitted and what is the timeline?

The deadline to submit draft/preliminary materials (i.e., business cases, addendums, prioritization matrix) to EIS is May 31, 2024. The earlier you engage your SIPM on reviews, the better. The deadline to submit finalized materials to EIS is July 1, 2024. The final version of the prioritization matrix should be reviewed and agreed upon by agency leadership and any governance committees prior to submission. A full timeline is shown below.

Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024
Early SIPM Engagement														
			Identify Project Initiatives											
			Develop & Review IT Business Cases & Addendums											
								SIPM Analysis	SIPM & CFO Collaboration					

March 14  
Budget  
Instructions  
Released

May 31  
Preliminary  
Materials  
Submitted

July 1  
Final  
Materials  
Submitted

December 1  
Governor's  
Recommended  
Budget Published

## What has changed in 2025-27 from prior biennia?

- An IT Investment form is no longer required
- Only IT projects need to be included on the IT Project Budget Spreadsheet (see below)

## What is the IT Project Budget Spreadsheet and what information should be included?

The IT Project Budget Spreadsheet is available on our [Guidance and Forms](#) webpage. It should include all new or continuing IT project investments that are part of a policy option package and with total costs of \$150,000 or greater.

A	B	C	E	F	G	H	I	J	K
Policy Group	Agency Name	IT Project Name	PPM Idea/Project Name	Mandate	Short Description	Start Date	End Date	Policy Option Package Request (Y/N)	POP #
Administration and Business Services	ABC	Example Project	Agency Idea/Project Name	Legislature	This effort replaces the previous example project.	2024-03-01	2025-05-01	Yes	999