

IT POLICY LETTER

	NUMBER: ITPL 09-02
SUBJECT: INFORMATION TECHNOLOGY CAPITAL PLANNING PROCESS, FORMS AND INSTRUCTIONS	DATE ISSUED: APRIL 10, 2009 EXPIRES: Until Rescinded
REFERENCES: Management Memo 08-07 State Administrative Manual Section 5819.31.4 and 4904 Statewide Information Management Manual Sections 05A and 57	ISSUING AGENCY: OFFICE OF THE STATE CHIEF INFORMATION OFFICER

Note: Agency Information Officers (AIO) and Department Chief Information Officers (CIO) are requested to forward a copy of this Information Technology Policy Letter (ITPL) to your Project Management Office and Information Technology (IT) Project Managers.

DISTRIBUTION Agency Secretaries
 Agency Information Officers
 Department Directors
 Department Chief Information Officers

PURPOSE The purpose of this Policy Letter is to:

- Provide information concerning the preparation and submittal of Agency and Department IT Capital Plans (July 2009 Plans) to the Office of the State Chief Information Officer (OCIO); and
- Remind Agency and department officials and staff of the submission date for Feasibility Study Reports (FSR) and Special Project Reports (SPR).

BACKGROUND On June 30, 2008, the OCIO released Management Memo 08-07, which added the IT Five Year Capital Planning requirements to the State Administrative Manual Sections 4819.31.4 and 4904. Using the Agency and department information provided in response to MM 08-07, the OCIO subsequently published the Five-Year Statewide IT Capital Plan (2009 Statewide Plan) in January 2009.

The 2010 Statewide Plan will build on the previous ITCP and continue to present a five-year view of the state's technology projects and initiatives.

JULY 2009 PLAN CONTENT The July 2009 Plan is divided into four segments plus supplemental components to facilitate preparation and submittal as follows:

a) **Segment One, Proposed IT Project Concepts** – Provides updated information concerning Project Concept Proposals that were included in the January 2009 Statewide Plan (i.e.,

Existing Concepts), along with information regarding new Project Concept Proposals (i.e., New Concepts).

- b) Segment Two, Approved IT Projects** – Provides information concerning IT Projects approved by the OCIO pursuant to SAM Section 4819.37, as well as IT projects delegated to Agencies and departments for approval pursuant SAM Section 4819.39.
- c) Segment Three, Consolidation** – Establishes a vision and goal(s) for the consolidation effort.
- d) Segment Four, Security** – Focuses on information security efforts and initiatives.
- e) Supplemental Reference Material and Transmittals** – Consists of: Strategic Plan Concepts and Strategies from the January 2009 California IT Strategic Plan; Business Reference Model, Technical Reference Model, and Service Reference Model information; and Agency and Department Executive Transmittal forms .

SIMM Section 57 is revised to include the instructions, workbooks, and supplemental material needed to complete and transmit the July 2009 Plan. The Preparation Instructions and workbooks for Segment One and Segment Two along with the Supplemental Reference Material and Transmittals are available now. The Segment Three Preparation Instructions are also included, and the workbooks will follow later this month. Segment Four portions of the July 2009 Plans will also be available later this month.

These materials can be downloaded from the OCIO's Website at: http://www.cio.ca.gov/Government/IT_Policy/SIMM.html.

Completed July 2009 Plans must be submitted to the OCIO by July 17, 2009. The OCIO will forward the July 2009 Plans to the Department of Finance. The July 2009 Plans and all attachments should be submitted electronically. Specific instructions regarding the submission will be issued separately. As a reminder, Agencies and departments must also submit FSRs and SPRs by July 17, 2009.

QUESTIONS

Questions should be directed to your OCIO Project Management Office (PMO) representative. A listing of PMO Managers and Principals and their departmental assignments can be found at the OCIO Web site located at: <http://www.cio.ca.gov/staffAssignments.html>.

SIGNATURE

/s/

Teri Takai,
Chief Information Officer
State of California
