Job Aide - IT Project Oversight Sample Scenarios

	Scenario A	Scenario B1	Scenario B2	Scenario C1	Scenario C2	Scenario D	Scenario E*
Examples	New system or existing legacy system replacement	Adding new functionality on existing system (i.e. accounting function)	Extending, removing or replacing existing functionality (i.e. new license type)	External facing system using SaaS (i.e. case management)	Internal facing system using SaaS (i.e. internal asset tracking)	Nominal enhancement to existing functionality (i.e. via Change Request)	Infrastructure Upgrade (i.e. PC, Printer, Local Area Network equipment, etc.)
IT Project vs. Non-IT Project	IT Project	IT Project	IT Project	IT Project	IT Project	IT Project	Non-IT Project
Non-Delegated - **Legislation** - **BCP** - **Above Delegation** - **Per AIO request**	Any of the four Non-Delegated	Any of the four Non-Delegated	Any of the four Non-Delegated	Any of the four Non-Delegated	None of the four Delegated	None of the four Delegated	Any or None of the four Non-IT Project
Visibility / Notification to CDT	PAL (S1 to S4) with CDT and DOF	PAL (S1 to S4) with CDT and DOF	PAL (S1), then seek project delegation via PAL or Project Delegation Request (PDR)	PAL (S1 to S2), then seek project delegation via PAL	No PAL – see *TL 15-01:COTS/SaaS Project Approval Delegation*	No PAL	No PAL – CDT will need info from Agency Portfolio Report to support a BCP or NCB
Final IT Project Delegation	Non-Delegated	Non-Delegated	Delegated if approved	Delegated if approved	Delegated	Delegated	Non-IT Project
Project Planning & Approval Lifecycle (PAL) – Stage Gate							
PAL coordination between CDT and Agency	Agency Portfolio - Agency manages portfolio and reports to CDT/DOF on a monthly basis						
	S1 vetting by Agency				N/A	N/A	N/A
	S2 to S4, BCP w/CDT/DOF	S2 to S4, BCPw/CDT/DOF	PDR and BCP w/CDT/DOF	S2 and BCP w/CDT/DOF	N/A	N/A	BCP (if any) w/CDT/DOF
Independent Project Oversight (IPO)							
Independent Project Oversight (IPO)	CDT, (in consultation with DOF ITCU)	CDT, (in consultation with DOF ITCU)	CDT/DOF ITCU If Non-Delegated; Agency – if Delegated	CDT/DOF ITCU if Non-Delegated; Agency – if Delegated	Agency project health monitoring		

IT Project Procurement Oversight			
Non-Delegated IT Projects (Over purchasing authority)	**Non-Delegated IT Projects (Under purchasing authority)**	**Delegated IT Projects (Over purchasing authority)**	**Delegated IT Projects (Under purchasing authority)**
CDT to oversee procurement	CDT to oversee procurement	DGS to oversee procurement	DGS to oversee procurement
CDT to procure (includes IT Projects in M&O phase)	CDT may authorize State entity to procure (i.e. using LPA) - (includes IT Projects in M&O phase)	DGS to procure (DGS has option to delegate to CDT or to state entity via one time delegation) - (includes IT Projects in M&O phase)	State entity to procure (State entity has option to request DGS to procure or ask CDT to consult) - (includes IT Projects in M&O phase)

*Procurement oversight entity for goods and services not related to an IT project is DGS.

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Definitions SAM Section 4819.2

Information Technology Project*: A unique endeavor involving activities required to plan, design, develop, implement, operate and maintain an Information Technology (IT) solution that meets a specific and measurable policy or programmatic objective. IT projects include the entire systems development lifecycle from project initiation through the normalized operational cycle. IT activities related to the refresh of non-data center hardware required to operate an IT project shall not be considered an IT project. See [SAM Section 4819.37](#) for Project Delegation Criteria.*