Gated Funding
Introductions & Why You Are Here
Agenda

• Introductions
• Gated Funding Process Overview
  • IT Project Assessment & Kickoff Meeting
  • Technology Budget
    • Technology Budget Data Reporting
  • Gate Request Application and Approval
  • Investment Plan and QA Readiness
  • Subsequent Gate Requests

• Next Steps
• Tasks and Duration
• Workshop Close
Gated Funding Process

1. Agency submits ITPA
   - to OCIO

2. Develop and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

3. Gated Funding kickoff meeting
   - Agency
   - OCIO
   - OFM

4. Planning Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

5. Regular assessment and reporting

6. Update and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

7. Investment plan and QA readiness
   - from Agency
   - to OCIO

8. Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

9. Regular assessment and reporting
IT Project Assessment & Kickoff Meeting

1. Agency submits ITPA
   - to OCIO

2. Gated Funding kickoff meeting
   - Agency
   - OCIO
   - OFM

3. Develop and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

4. Planning Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

5. Regular assessment and reporting
   - Agency

6. Update and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

7. Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

8. Regular assessment and reporting
   - Agency

9. Investment plan and QA readiness
   - from Agency
   - to OCIO
Technology Budget

1. Agency submits ITPA
   - to OCIO

2. Gated Funding kickoff meeting
   - Agency
   - OCIO
   - OFM

3. Develop and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

4. Planning Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

5. Regular assessment and reporting

6. Update and approve technology budget
   - from Agency
   - to OCIO
   - to OFM

7. Gate request Application and approval
   - from Agency
   - to OCIO
   - to OFM

8. Regular assessment and reporting

9. Update and approve technology budget
   - from Agency
   - to OCIO
   - to OFM
Technology Budget Data Reporting

- Budget: Developed in Excel
- Actuals: Coded in AFRS
- Data Loaded to Apptio
- Public Dashboard

6/10/2019
Planning Gate Request: Application and Approval Process

1. Agency submits technology budget
   - to OMF
   - to OCIO

2. Gate Request
   - OCIO and OFM approve technology budget
   - to Agency

3. Agency applies for gate funding with approved TB
   - to OMF
   - to OCIO

4. OFM notify for 10-workday review
   - to Legislative Committees

5. OFM approve allotment

6. Approval
   - to Agency
Investment Plan and QA Readiness Assessment

1. Agency submits ITPA
   - ✓ to OCIO

2. Develop and approve technology budget
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

3. Planning Gate request Application and approval
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

4. Regular assessment and reporting
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

5. Investment plan and QA readiness
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

6. Update and approve technology budget
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

7. Regular assessment and reporting
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

8. Gate request Application and approval
   - ✓ from Agency
   - ✓ to OCIO
   - ✓ to OFM

9. Gated Funding Workshop
   - ✓ Agency
   - ✓ OCIO
   - ✓ OFM

6/10/2019
Subsequent Gate Requests

1. **Agency submits ITPA**
   - to OCIO

2. **Develop and approve technology budget**
   - from Agency
   - to OCIO
   - to OFM

3. **Gated Funding kickoff meeting**
   - Agency
   - OCIO
   - OFM

4. **Planning Gate request Application and approval**
   - from Agency
   - to OCIO
   - to OFM

5. **Regular assessment and reporting**

6. **Update and approve technology budget**
   - from Agency
   - to OCIO
   - to OFM

7. **Gate request Application and approval**
   - from Agency
   - to OCIO
   - to OFM

8. **Regular assessment and reporting**

9. **Investment plan and QA readiness**
   - from Agency
   - to OCIO
   - to OFM

Date: 6/10/2019

Gated Funding Workshop
Tasks and Duration

- Agency submits ITPA to OCIO (OCIO response within 5 days)
- Agency submits technology budget to OCIO and OFM
- Legislative committees review (10 working days)
- Agency submits gate request to OCIO (OCIO response within 30 days)
- OCIO sends gate request certification to OFM
- OFM approves allotment
Workshop Close

Questions?
Resources and Helpful Links

• ESHB 1109 – Gated Funding Section

• ITPA https://ocio.wa.gov/it-projects/it-project-assessment-tool

• Investment Plan Template https://ocio.wa.gov/policy/it-investments-procedures

• IT Dashboard https://waocio.secure.force.com/

• OCIO Website https://ocio.wa.gov