



Office of Information Technology Tactical Plan Process

FY Steps 1 & 2 - Tactical Planning Guidelines and Helpful Hints

Step Process

The Tactical Planning reporting for FY is now underway

FY will be done as a two step approach:

1. Completion of the Agency Tactical Planning Maintenance and Refresh Plans
2. Completion the FY Project Portfolio Status and the Summary of IT Project Initiatives, Maintenance & Refresh Total Cost Estimates

Timeline

OIT Tactical Planning Unit (OIT TPU) will send 2 requests for information on or about:

1. Step 1 –
2. Step 2 –

Please return the annual Tactical Planning Documents to OIT.workrequest@tech.nj.gov by the below requested dates:

- a. **Step 1 documents by**
 - i. IT Maintenance and Refresh Plans with projected cost for each individual maintenance or refresh cost for the current, and next 2 fiscal years.
- b. **Step 2 documents by**
 - i. FY Project Portfolio Status Template – a reporting of ongoing projects that have been reported through Tactical Planning and/or System Architecture Reviews
 - ii. Summary of IT Project Initiatives, Maintenance & Refresh Total Cost Estimates

STEP 1 - DOCUMENT GUIDELINES AND HELPFUL HINTS

Maintenance or IT Refresh Plan Template

These documents must be completed for all projected Maintenance and IT Refresh Costs by . These costs are considered separate and distinct; therefore, each Agency is required to submit separate plans, 1 for Maintenance and 1 for Refresh.

1. Project Basics:

- a. Check off the appropriate Project Name: Maintenance or Refresh
- b. Enter the Project Tracking Number

Helpful Hint: The Tracking Number for the Maintenance Plan must end in 0001. The Tracking Number for the Refresh Plan must end in 0002.

2. Project Description:

- a. Check off the appropriate Project Name: Maintenance or Refresh. The scopes for both the Maintenance and Refresh Project have been defined in this section. If necessary, add additional information as requested.

3. Funding:

- a. Enter the estimated cost for the current FY and next two FYs by Funding Source.

4. Procurements:

- a. Provide information for the categories listed. Any procurement for a category listed that will be \$25,000 or greater must be listed as a separate line item. Procurements that will be less than \$25,000 can be grouped together into the appropriate category.

Helpful Hint: The IT Checklist asks for a description on how the procurement aligns to the Plan. In this case, write the line item that corresponds to the procurement.

Step 2 - Document Guidelines and Helpful Hints

Agency Summary of IT Project Initiatives, Maintenance & Refresh Cost Estimates

This document provides information on the IT initiatives within an Agency project name, program area, and estimated spending for the current and next 2 Fiscal Years to be completed by

Project Portfolio Status

This template provides detailed information needed to complete Agency Recommendation Reports on all possible projects identified by the OIT TPU as reported through Tactical Planning, Procurement and System Architecture Review processes. This must be completed by all Agencies for all projects by

Template Instructions

Please complete for all active projects. Listed are the projects reported by the Agency via the Tactical Planning, Procurement Processes and information obtained from System Architecture Review reporting. See column by column instructions for completion below:

Column	Description	Update Needed (Yes/No)	If Yes, Action Needed
A	Department	Y	When an Agency has a new Project that is active but has not yet submitted to SAR
B	Initiative/Project Name	Y	When an Agency has a new Project that is active but has not yet submitted to SAR
C	Tactical Plan/Project Tracking Number	Y	Update if this ends "TBD"
D	Project Description	Y	Update if this is blank
E	OIT Use Only – OIT PMO Recommends Removing	N	OIT PMO is recommending that certain projects be removed from the Portfolio and Closed. In some cases, it appears that the project is complete, in others, it is due to inactivity. In all cases, an explanation for the reason for removal is provided (see Column H).
F	OIT Use Only – The OIT TPU reason for Recommendation	N	OIT Use Only - If closing and/or removing project is recommended, explanation is provided.
G	Agency Response	Y	If a recommendation was made to remove the project, the Agency must confirm removal, or, provide a reason to keep the project Open and Active.
H, I, J	Project Continuation Status	Y	For each project listed, place an X in the appropriate column indicating if the project is continuing, not continuing or is on Hold.
K	Is this new in FY 20	Y	If this is the first time that this project has been reported, place an X in this column.

L	Architectural Reviews	Y	Review and Verify for Accuracy – Validate if the answer was accurately captured; verifies if System Architecture Reviews were submitted and if applicable, held or waived.
M, N, O, P	TIP/LSAR/PSAR/IR	Y	Review and Verify for Accuracy - SAR status has been captured accurately as reported, update any inaccurate or incomplete information
Q	What happened in FY XX (prior FY)	Y if Column E is selected	Provide a brief description of the activities that occurred in FY 19.
R	What will be happening in FY XX (current FY)	Y if Column E is selected	Provide a brief description of the activities that will occur in FY 20.
S	Start Date	Y	Update if incorrect or blank
T	End Date	Y	Update if incorrect or blank, and or called for in the recommendation to close where the Agency recommends the project remain open
U	Total Cost	Y	Update if incorrect or blank to include the costs for all purchases required from the start date to the end date of the project
V	Agency Project Manager	Y	Update if incorrect or blank
W	OIT Contact Person	Y	When a new project is considered active but has not been submitted to SAR where OIT Contact information cannot be pulled from SAR Documentation

Agency Tactical Plan Number Assignment Guidelines & Helpful Hints

Tracking Number Naming Convention Rules:

1. Consists of **10** characters:
 - a. The first 3 characters are the NJCFS Agency Code (see last page of this document)
 - b. The **fourth character is the alpha character** assigned by your agency (see last 2 pages of this document)
 - c. The fifth and sixth characters are the FY in which the project began.
 - d. The last four numbers are assigned by your agency. The Tracking Number for the Maintenance Project must end in 0001. The Tracking Number for the IT Refresh Project must end in 0002.
2. The Maintenance and Refresh Projects must have a new Tracking Number each year reflecting the current year FY.
3. For all other projects: Once a Tracking Number is assigned, it does not change and will remain with this project until the project is closed.

Agency Codes

Department / Agency / Commission	NJCFS Agency Code	Alpha character
Agriculture	010	a
Banking & Insurance	014	a
Children & Families	016	a
Civil Service Commission (Formerly Personnel)	062	c
Community Affairs	022	a
Corrections	026	a
Corrections - State Parole Board	026	b
Education	034	a
<i>Education - MKSD (Marie Katzenbach School)</i>	<i>034</i>	<i>b</i>
Environmental Protection	042	a
Health & Senior Services - OC; M&A; Other	046	a
Health & Senior Services - Public Health	046	b
Health & Senior Services - Senior Services	046	c
Human Services	054	a
Labor & Workforce Development	062	a
Public Employment Relations Commission	062	b
Law & Public Safety	066	a
Law & Public Safety - State Police	066	b
Office of Homeland Security and Preparedness	066	c
Military & Veterans' Affairs	067	a
Public Advocate	070	a
State	074	a
Transportation	078	a
Motor Vehicles Commission (MVC)	078	b
Treasury	082	a
Treasury - Board of Public Utilities (BPU)	082	b
Treasury - Casino Control	082	c
Treasury - Office of Administrative Law	082	d
Treasury - Office of Public Defender	082	o
Office of Information Technology (OIT)	082	z

Example:

Department / Agency / Commission	NJCFS Agency Code	Alpha character
Education	034	a
Education - MKSD (Marie Katzenbach School)	034	b