pennsylvania
OFFICE OF ADMINISTRATION
INFORMATION TECHNOLOGY

Information Technology Bulletin

IT Projects and Project Management

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Contact ra-oaitb@pa.gov	***Scheduled Review*** Annual

Agencies implementing IT projects that exceed $250,000 must receive approval from OA/OIT.

Agencies implementing IT projects that exceed $1 million must assign a project manager.

1. Purpose: This Information Technology Bulletin (ITB) establishes policy for IT Projects. The ITB establishes dollar thresholds for IT projects to require OA/OIT approval and project managers to ensure agency IT projects align with the commonwealth's high level goals and objectives.

2. Scope: This ITB applies to all departments, boards, commissions and councils under the Governor's jurisdiction. Agencies not under the Governor's jurisdiction are strongly encouraged to follow this ITB.

3. Definitions

Information Technology (IT) Application Project: A planned effort to replace or modernize existing legacy applications, or deliver new application system solutions that has defined start and end dates. IT application projects include, but are not limited to: a) Custom builds of applications; procurement and implementation of Commercial of off-the-Shelf (COTS) software products (with or without customization); and the procurement of outsourced solutions to replace existing legacy applications or to deliver new

application systems; b) Modernizing the existing legacy application through targeted modifications, migrations and/or re-hosting initiatives to extend the useful life of existing applications and the reuse of existing application functionality.

Commercial of the Shelf (COTS): Commercially available Off-The-Shelf (COTS) software is prepackaged software that is sold in the commercial marketplace to numerous businesses or government entities that can be procured or utilized under government contract in the same form as available to the general public.

Outsourced Services: Are services that involve delivering hosted services over the internet or some other mechanism {i.e., Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS) Software-as-a-Service (SaaS), or other outsourced service delivery model}.

Modernization: Is the transition or transformation of existing information technology (IT) assets to enhance performance, functionality, reliability, scalability, security, quality of service, and/or revitalize applications or extend the useful life of computing platforms and infrastructure used to support business operations.

Migration: Migration involves the moving from one operating environment to another or involving moving to new hardware, new software, or both. For example: Migration of data from one database to another kind of database, moving from one database to another, or switching platforms (from one OS to another OS).

Modify: To rewrite, rebuild, and/or re-architect legacy applications to create new or enhanced existing functionality, Service Oriented Architecture (SOA) components/service offerings, update computer programming language or database software, protocols, and/or integrating new technologies or services. In addition, this includes the rebuilding and/or re-architecting hardware platforms and infrastructures to meet capacity or performance needs of the business. Running the legacy applications, with no major changes (configuration only), on a different platform or

Re-hosting: is the transitioning of legacy applications and infrastructure with no major changes (configuration only) to enterprise cloud services (i.e., private, public, or hybrid) using contracted host services offerings.

Legacy: Is any application or a platform that is based on older technologies (i.e., software, hardware, and infrastructure) that continues to provide core services to an organization.

IT projects are defined by the following categories and types:

Category	Type	Description
Replace	**COTS**	Procurement, configuration, and implementation of a Commercial Off the Shelf (COTS) product to replace the legacy application. This assumes no modifications or customization to the base COTS product.
	COTS with Modifications	Procurement, configuration, and implementation of a Commercial Off the Shelf (COTS) product to replace the legacy application that will involve modifications or customization to the base COTS product.
	Custom Development	Custom build of a new application to replace the current or legacy application.
	Outsourced Services	The procurement, configuration, and implementation of new cloud or other contracted hosted services offerings to replace the current or legacy application.
Modernize	**Application Modify**	To rewrite, rebuild, and/or re-architect legacy applications to create new or enhanced existing functionality, Service Oriented Architecture (SOA) components/service offerings, integrating new technologies or services, rebuilding and/or re-architecting hardware platforms and infrastructures to meet capacity or performance needs of the business.
	Migration	Moving or upgrading a current or legacy system with the same functionality from one operating environment to another or involving moving to new hardware, new software, or both.
	Application Re-hosting	Transitioning the current or legacy applications and infrastructure, with no major changes (configuration only) to enterprise cloud services (i.e., private, public, or hybrid) using contracted host services offerings.
New	**COTS**	Procurement, configuration, and implementation of Commercial Off the Shelf (COTS) products, third party software to support new business requirements. This assumes no modifications or customization to the base COTS product.
	COTS with Modifications	Procurement, configuration, and implementation of a Commercial Off the Shelf (COTS) product to replace the legacy application that will involve some modifications or customization to the base COTS product.
	Custom Development	Custom build of a new application to support new business requirements.
	Outsourced Services	The procurement, configuration, and implementation of new cloud or other contracted hosted services offerings to support new business requirements.

4. Objective

Establish policy for requesting IT project approval and requirements for the assignment of project managers.

5. Policy

Agencies implementing new IT projects that exceed $250,000 must request and obtain approval from OA/OIT to begin project execution. Agencies shall complete and submit both the IT Project Request Form and IT project scaling template. IT project scaling template is used to assist in the evaluation process and determining the level of status reporting required.

Agencies implementing IT projects that exceed $1 million must assign a project manager.

6. Responsibilities

Agencies under the Governor's Jurisdiction

a. New IT Project Exceeding $250,000

Agencies shall request OA/OIT approval for all new IT projects that exceed $250,000 using the OA/OIT project request form and provide periodic status updates to OA/OIT for these project initiatives. To request project approval, agencies are required to submit an IT Project Request Form along with the associated IT project scaling template (reference notes below).

b. IT Projects Exceeding $1 million

For all IT projects that exceed $1 million, agencies shall obtain and assign a project manager and provide OA/OIT notification of the project manager. To request project approval and to notify OIT of your project manager assignment, agencies are required to submit the IT Project Request Form along with the associated IT project scaling template (reference notes below).

c. OA/OIT

OA/OIT shall review & approve all IT project requests for projects that exceed $250,000.

Notes:

1) The IT project request form and/or scaling template can be obtained on IT Central (Document Libraries>Strategic Planning> Agency Strategic Planning> Forms and Templates).

2) Completed IT project request forms and associated scaling templates shall be submitted to IT Central (Document Libraries>Strategic Planning> Agency Strategic Planning> Project Submissions by Year>*20XX*).

7. Related ITBs/Other References

Management Directive 310.37

8. Authority

- Executive Order 2011-05, Enterprise Information Technology Governance

9. Publication Version Control

It is the user's responsibility to ensure they have the latest version of this publication. Questions regarding this publication are to be directed to ra-oaitb@pa.gov. Notifications will be issued from the subscription list on the OA-ITB Alert Collaboration Site for new versions.
Vertical lines in the left margin indicate changes from the last revision of the document. This chart contains a history of this publication's revisions:

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Original		Base Document