

IT Strategic Plan Financial Screen

Display of the IT Strategic Plan Form

Planview Portfolios | Menu Strategies | Strategy 136 VITA 2026-28 ITSP | New | Search...

Strategy View | Objectives and Key Results | Financials | Lifecycle | Investment Dependencies | Schedule | Associated Work | IT Strategic Plan | IT Strategic Plan - ITMD Second Review | IT Strategic Plan Approval Notification

Edit | View History

IT Strategic Plan

Agency Mission Goals Objectives Pain Points

- Agency Mission
- Agency Goals
- Agency Objectives
- Agency Pain Points

Current IT State

In this section, describe the high-level strategy the agency will use to manage existing operational IT investments over the next year to 6 years. This section should align with identified Business Requirements for Existing Technology (BRETs).

You may copy the Agency Mission, Goals, Objectives and Pain Points from Section 1 of the Prescriptive IT Strategic Plan provided by your CAM.

Current IT State

Current IT State

Current IT State part 2

External Factors Impacting the Current IT

In this section, the agency will describe the changes in their business environment that will require or mandate changes to the agency's current IT investments. These are requirements and mandates from external sources, such as other agencies or business partners, the agency's customer base, product and service providers, or new federal or state legislation or regulations. Each requirement or mandate from an external source must have a corresponding Business Requirement for New Technology (BRNT) or Business Requirement for Existing Technology (BREt) entered into the CTP. The agency must identify the business value of the change, any important deadlines that must be met, and the consequences if the deadlines are not met. In your discussion, be sure to note whether the proposed enhancements are funded or not.

If the agency's existing current IT investments will not need enhancement due to requirements or mandates from external sources in the foreseeable future, the agency should enter the following text rather than leave the Factors Impacting the Current IT section blank.

- For each mandated change, summarize your agency's response from your Agency Strategic Plan, and is it the opinion of agency IT leadership that the IT portion of the response is adequately funded?

Business Context

Biennium	FY26-28
Proponent Secretary	180 Secretary of Administration
Proponent Agency	136 Virginia IT Agency (VITA)

Agency has BRTs or Investments	Yes
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IT Strategic Plan Budget Tables

To update the IT Strategic Plan Budget click the "Financials" button below.

ITSP Guidance can be found on the link below.

[Financials](#)

[ITSP Guidance](#)

Approvers

AITR

Patrick Morrissey

Agency Head

Patrick Morrissey

Click the Financials Button to bring up the Financials Screen

Financials Screen Display

Verify the Actual Project Spend Version is displayed

The screenshot displays a financial planning application interface. At the top, there is a header bar with a star icon, the text 'Program/ITSP 136 VITA 2026-28 ITSP', and 'View Financials'. On the right side of the header, there is a 'Version' dropdown menu currently set to 'Actual Project Spend'. Below the header is a search bar with the placeholder 'Type to filter' and a 'View Detail' dropdown. To the right of the search bar is an 'Add a Line' button and a 'All Available Account Lines' dropdown. The main area is a table with columns for 'Description', 'Measures', 'Line Notes', and years from 2021 to 2028. The table contains several rows of financial data, including 'Program/ITSP: 136 VITA 2026-28 ITSP' and various sub-categories like 'Type: Project - Benefits', 'Cost Avoidance', 'Cost Savings', 'Increased Efficiency', 'Increased Revenues', and 'Other cost savings'. A green callout box points to the 'Actual Project Spend' option in the 'Working Version' dropdown menu, which is open on the right side of the screen. The dropdown menu also includes options for 'Display Variance with Comparison Version' (set to 'Off'), 'Comparison Version' (set to 'Proposed Change Request'), and buttons for 'Excel' and 'Manage Plan'.

Description	Measures	Line Notes	2021	2022	2023	2024	2025	2026	2027	2028
Program/ITSP: 136 VITA 2026-28 ITSP	USD									
Type: Project - Benefits	USD									
> Cost Avoidance	USD									
> Cost Savings	USD									
> Increased Efficiency	USD									
> Increased Revenues	USD									
> Other cost savings	USD									
Type: Funding	USD									
> General Funds	USD									
> CF Current IT Services	USD									

Ensure the Actual Project Spend Version is selected here

Setting the Time Period

Click the Gear icon to bring up the Financial Plan Preferences box

The screenshot displays a financial planning application interface. At the top, there is a header bar with 'Program/ITSP 136 VITA 2026-28 ITSP' and 'View Financials'. Below this is a toolbar with options like 'Type to filter', 'View Detail', 'Add a Line', 'All Available Account Lines', 'Focus Control', and 'Years'. The main area is a table with columns for years from 2021 to 2032. A 'Financial Plan Preferences' dialog box is open, showing options for 'Viewable Range' (Planning Horizon, Encompass schedule and cost, or Custom periods) and 'Show Totals' (Quarter, Year, or Actuals/Forecast). A green callout box points to the gear icon in the toolbar, and another green callout box points to the 'Custom periods' selection in the dialog box, specifically highlighting the date range 'Jul 2026' to 'Jun 2028'.

Description	Measures	Line Notes	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Program/ITSP: 136 VITA 2026-28 ITSP	USD													
Type: Project - Benefits	USD													
> Cost Avoidance	USD													
> Cost Savings	USD													
> Increased Efficiency	USD													
> Increased Revenues	USD													
> Other cost savings	USD													
Type: Funding	USD													
> General Funds	USD													
>> GF Current IT Services	USD													
>>> GF Estimated VITA Infrastruct	USD													
>>>> Projected Service Fees	USD													
>>>> VITA Infrastructure Chang	USD													
>>> Specialized Infrastructure	USD													
>>> Agency IT Staff	USD													
>>> Non-agency IT Staff	USD													

Financial Plan Preferences

Viewable Range

- Planning Horizon (Jul 2015 To Jun 2032)
- Encompass schedule and cost
- Custom periods Jul 2026 To Jun 2028

Show Totals

- Quarter
- Year
- Actuals/Forecast

Cancel Save

Select Custom Periods: July 2026 To Jun 2028

Screen Display

Description	Measures	Line Notes	2027	2028	Total
Program/ITSP: 136 VITA 2026-28 ITSP	USD				
Type: Project - Benefits	USD				
> Cost Avoidance	USD				
> Cost Savings	USD				
> Increased Efficiency	USD				
> Increased Revenues	USD				
> Other cost savings	USD				
Type: Funding	USD				
> General Funds	USD				
>> GF Current IT Services	USD				
>>> GF Estimated VITA Infrastruct	USD				
>>>> Projected Service Fees	USD				
>>>> VITA Infrastructure Chang	USD				
>>>> Specialized Infrastructure	USD				
>>>> Agency IT Staff	USD				
>>>> Non-agency IT Staff	USD				
>>>> Cloud Computing Service	USD				
>>>> Other Application Costs	USD				
>>>> GF Proposed IT Investments	USD				

Fiscal Years 2027 and 2028 are displayed

Now click Description to collapse the account lines

Collapsed Screen

Planview Portfolios | Menu Strategies > Strategy 136 VITA 2026-28 ITSP

Strategy View | Objectives and Key Results | Financials | Lifecycle | Investment Dependencies | Schedule | Associated Work | IT Strategic Plan | IT Strategic Plan - ITIMD Second Review | IT Strategic Plan Approval No

Type to filter | View Detail | + Add a Line | All A

Description	Measures	Line Notes	2027	2028	Total
Program/ITSP: 136 VITA 2026-28 ITSP	USD				

Click Program/ITSP to expand the account lines

High Level Account Line Display

Program/ITSP 136 VITA 2026-28 ITSP		View Financials					
Type to filter		View Detail	+	Add a Line			All Availab
Description	Measures	Line Notes	2027	2028	Total		
Program/ITSP: 136 VITA 2026-28 ITSP	USD						
> Type: Project - Benefits	USD						
> Type: Funding	USD						
> Type: Funding Need	USD						
> Type: Budget Plan - Costs	USD						
> Type: O&M Funding	USD						

Click Funding

Current IT Services Display

Description	Measures	Line Notes	2027	2028	Total
Program/ITSP: 136 VITA 2026-28 ITSP	USD				
> Type: Project - Benefits	USD				
> Type: Funding	USD				
>> General Funds	USD				
>>> Non-General Funds	USD				
>>>> NGF Current IT Services	USD				
>>>>> NGF Estimated VITA Infrastructure	USD				
>>>>>> Projected Service Fees	USD				
>>>>>> VITA Infrastructure Changes	USD				
>>>>> Specialized Infrastructure	USD				
>>>>> Agency IT Staff	USD				
>>>>> Non-agency IT Staff	USD				
>>>>> Cloud Computing Service	USD				
>>>>> Other Application Costs	USD				
>>>>>> NGF Proposed IT Investments	USD				

Click Non-General Funds, you may need General Funds

Click NGF Current IT Services

Click NGF Estimated VITA Infrastructure

Current IT Services Detail

Program/ITSP 136 VITA 2026-28 ITSP		View Financials				
Type to filter		View Detail	+ Add a Line	All Available		
Description	Measures	Line Notes	2027	2028	Total	
Program/ITSP: 136 VITA 2026-28 ITSP	USD					
> Type: Project - Benefits	USD					
Type: Funding	USD					
> General Funds	USD					
> Non General Funds	USD					
>> NGF Current IT Services	USD					
>>> NGF Estimated VITA Infrastructure	USD					
>>>> Projected Service Fees	USD					
>>>> VITA Infrastructure Changes	USD					
>>> Specialized Infrastructure	USD					
>>> Agency IT Staff	USD					
>>> Non-agency IT Staff	USD					
>>> Cloud Computing Service	USD					
>>> Other Application Costs	USD					
>> NGF Proposed IT Investments	USD					

Projected Service Fees (provided by VITA)

Enter any VITA Infrastructure Changes (anticipated amount in addition to Projected Service Fees)

Enter expense for any hardware not supported by VITA

Enter total cost of agency IT FTEs

Enter any IT contractor expense estimates (Staff Aug PGRs)

Enter total cost of any non-VITA cloud contracts

Enter total costs of software licenses, subscriptions

Proposed IT Investments

Strategy View Objectives and Key Results Financials Lifecycle Investment Dependencies Schedule Associated Work IT Strategic Plan IT Strategic Plan						
<input type="text" value="Type to filter"/>		View Detail	+ Add a Line			
Description	Measures	Line Notes	2027	2028	Total	
Program/ITSP: 136 VITA 2026-28 ITSP	USD					
> Type: Project - Benefits	USD					
> Type: Funding	USD					
>> General Funds	USD					
>> Non General Funds	USD					
>>> NGF Current IT Services	USD					
>>> NGF Proposed IT Investments	USD					
>>>> Major IT Projects	USD					
>>>> Non-Major IT Projects	USD					
>>>> Agency-Level IT Projects	USD					
>>>> Major IT Procurements	USD					
>>>> Non-Major IT Procurements	USD					
>>>> Agency-Level Stand Alone IT Procurements	USD					
>>>> Procurement Adjustment for Staffing	USD					
>>>> Federal Funds	USD					

Click NGF Proposed IT Investments

Total NGF cost of major projects

Total NGF cost of non-major projects

Total NGF cost of agency projects

Total NGF cost of major procurements

Total NGF cost of non-major procurements

Total NGF cost of agency procurements

Totals for projects and procurements are listed in the ITSP Project Procurement Report detailed below

ITSP Project and Procurement Totals in CTP

CTP will total your project and procurement amounts with this report tile

Click the tile to open the report

The screenshot shows the Planview Portfolios interface. The top navigation bar includes the Planview logo, 'Menu Strategies', and 'Strategy Portfolio ITSP 24 26'. A search bar is on the right. Below the navigation bar, there are several report tiles. The 'ITSP Project Procurement' tile is highlighted with a green box, and a green arrow points from a callout box to it. The callout box contains the text 'Click the tile to open the report'. Below the tiles is a filter input field and a table with columns for Name, Proponent Agency, Proponent Secretary, ITSP Approval - AITR, ITSP Approval - AH, ITSP Approval - AH Date, ITSP Approval - CIO, ITSP Approval Date - CIO, Biennium, and ITSP Recommendation - CAM. The table contains four rows of data.

Name	Proponent Agency	Proponent Secretary	ITSP Approval - AITR	ITSP Approval - AH	ITSP Approval - AH Date	ITSP Approval - CIO	ITSP Approval Date - CIO	Biennium	ITSP Recommendation - CAM
147 OSIG 2024-26 ITSP	147 Office of the State Inspecto	180 Secretary of Adn	Yes	Yes	8/30/2023	Yes	9/12/2023	FY24-26	Yes
167 ODGA FY2024-26 ITSP	167 Office of Data Governance	180 Secretary of Adn	Yes	Yes	1/10/2024	Yes	1/22/2024	FY24-26	Yes
129 DHRM 2024-26 ITSP	129 Department of Human Res	180 Secretary of Adn	Yes	Yes	8/23/2023	Yes	9/15/2023	FY24-26	Yes
132 ELECT 2024-26 ITSP	132 Department of Elections	180 Secretary of Adn	Yes	Yes	11/29/2023	Yes	12/8/2023	FY24-26	Yes

Selecting Your Agency

After clicking the tile, the first part of the report is displayed

The screenshot shows a software interface with a dark teal header. The header contains the text 'Planview Portfolios', 'Menu Strategies', and 'Strategy Portfolio ITSP 24 26'. There is a 'New' button and a search bar. Below the header, there is a navigation bar with 'Portfolio View' and 'Portfolio Members'. A row of report tiles is displayed, including '65 Portfolio Manager', '8 Active Lifecycle Steps', 'ITSP_Agency_BRTs', 'ITSP_Projects', 'ITSP_Procurements', 'ITSP Project Procurement', 'ITSP_Summary', 'ITSP Budget Tables 2426', 'ITSP QA and Approval Dates', 'BRTS With LOB', 'Budget_22-24', 'IT Strategic Plan Status (STR16)', 'Budget_20-22', 'All Agency Budget Tables 23-24', 'more ...', and 'Analyze'. Below the tiles, there are buttons for 'Save Parameters', 'Apply to all strategies', and 'Export Only'. At the bottom, there is a dropdown menu for 'AgencyCode' with the text '<Select a Value>' and a 'View Report' button.

1. Click the three dots on the bar to display the agency selection

2. Select your agency

3. Now click the View Report Button

ITSP Project and Procurement Totals Report Basics

- The report shows tables for:
 - Major projects \geq \$1,000,000
 - Non-major projects $<$ \$1,000,000
 - Major procurements \geq \$1,000,000
 - Non-major procurements $<$ \$1,000,000
 - Totals from each table should be copied and pasted into the corresponding account line and fiscal year on the Financials form

ITSP Project and Procurement Totals Report Basics cont.

- This report shows:
 - Projects with Investment Business Case (IBC) approval or Project Initiation Approval (PIA) and General Fund (GF) and Non-general Fund (NGF) amounts for each
 - The sum of project GF and NGF for the agency
 - Procurements with funding in FY 2027 or FY2028 and GF and NGF for each
 - The sum of procurement GF and NGF for the agency

ITSP Project and Procurement Totals Report Display

Strategy Detail	Strategy/Program Details (STR16)	Financial Analysis (STR31)	Financial Burndown Comparison (STR32)	ITSP Project Procurement	ITSP_Agency_BRTs	Budget_22-24	ITSP_Summary	ITSP Budget Tables 2426	ITSP QA Approval
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AgencyCode 136 Virginia IT Agency (VITA) ▼

Navigation bar with icons for back, forward, refresh, search, and print. Includes a page indicator '1 of 1' and a zoom level of '100%'.

Major Projects

136 Virginia IT Agency (VITA)	Project Title	Total Cost	GF 27	NGF 27	Internal labor 27	GF 28	NGF 28	Internal labor 28
	Cybersecurity plan capability assessment project	\$4,052,929.00		\$1,520,125.00			\$2,125,000.00	
	IAM SailPoint	\$3,000,000.00						
	Translation Services Project	\$2,527,000.00						
	VeraSmart Project	\$2,471,000.00						
	Virginian Identity Project	\$2,304,600.00		\$1,782,300.00			\$563,400.00	
	VSP Transformation Program	\$8,424,087.00						
	Totals			\$3,302,425.00			\$2,688,400.00	

NGF total for FY 2027

This total should be copied and pasted into the financial planning detail for NGF Major Projects