

## 2026-2027 IT Investment Process Guidance

This document provides guidance to agencies planning to request new technology investments of \$250,000 or more or additional appropriation for existing projects in the 2026-2027 budget. For more information, contact [Sierra Anderson](#) at the Office of Performance, Strategy, and Budget (PSB).

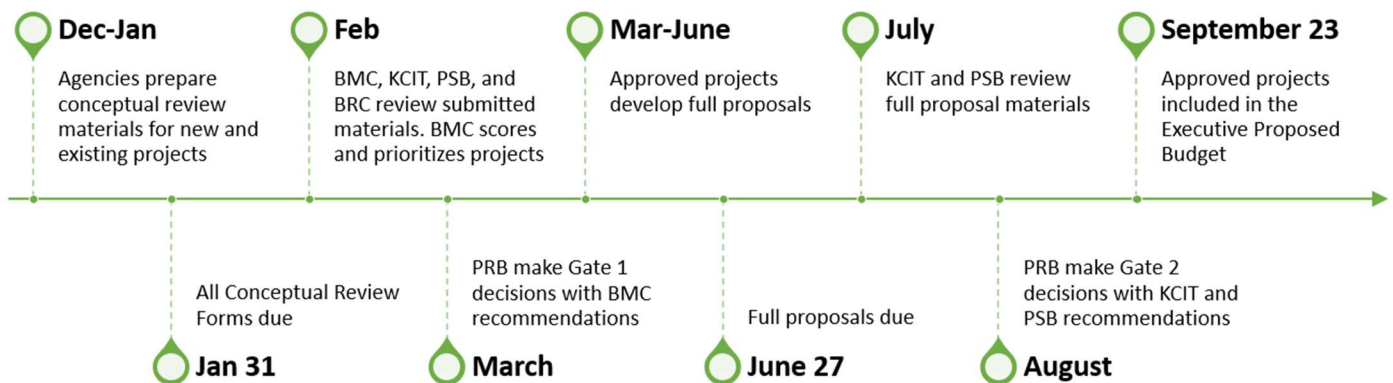
### IT Investment Process Overview

The IT Investment Process aims to make the best use of the County's limited resources while ensuring transparency into technology investments. The process includes three gates:

1. Conceptual review
2. Executive full proposal review
3. Council review

At each gate, proposed investments will be screened against criteria. Only those investments that successfully pass the preceding gate will be considered at the next gate.

The timeline below provides an overview of the 2026-2027 IT Investment Process, including key dates. The complete [schedule](#) is available on the [IT Investment SharePoint site](#).



**Process Changes:** The 2026-2027 IT Investment Process includes the following key changes.

1. All projects (new agency-specific, new enterprise, and existing) follow the same timeline. This will allow KCIT and PSB to evaluate and prioritize technology investments more holistically.
2. Agencies will be asked for additional information on the Conceptual Review Form.
3. The Conceptual Review Form is now an online form, which will allow KCIT and PSB to manage requests through a central database.

4. No Gate 1 sponsor presentations. Agencies are encouraged to focus on more intentional conceptual review forms since there will not be sponsor presentations.
5. Prioritization criteria have been further refined to leverage the additional information requested in the Conceptual Review Form.
6. All projects will be reviewed and prioritized together.

### Required Deliverables

Gate	Deliverable	How to Submit	Due Date
Gate 1	Conceptual Review Form – New Project or Existing Project	Power Platform	January 31, 2025
Gate 2	Capital Appropriation Proposal (CAP)	Project Information Center (PIC) for capital requests	June 27, 2025
Gate 2	Cost Template	Sharepoint	June 27, 2025
Gate 2	Benefit Achievement Plan (BAP)	Sharepoint	June 27, 2025

### Gate 1: Conceptual Review (February – March)

**Forms:** All projects will complete a **conceptual review form** during the conceptual review phase. New IT projects with a total estimated cost of \$250,000 or greater and existing IT projects requesting additional appropriation will submit a conceptual review form. Agencies can save their work and come back to complete their form as needed. **All conceptual review forms are due on January 31, 2025.**

**Sponsor presentations** are not required for new or existing projects during the 2026-2027 process.

**Gate 1 Evaluation Criteria and Rating Scale:** All technology investments will be evaluated using the following criteria:

- Social Equity and Inclusion
- Public Impact – Efficiency
- Addresses a Key Consideration
  - Life and Safety
  - Regulatory/ Legal Compliance
  - Security and Privacy
  - Reputational Risk
- Strategic Alignment
- Technical Debt
- Technical Feasibility
- Cost Savings

**Each criterion will be scored on a 1-5 rating scale.** Ratings will be aggregated, feedback summarized, and shared with the Project Review Board (PRB).

**Decision Making:** At conceptual review, all investments will be reviewed and prioritized by the Business Management Council (BMC). King County Information Technology (KCIT), Business

Resource Center, and PSB analysts will also review investments from a resourcing perspective. A prioritized list of all investments will be provided to the PRB to make final selections at each gate. The PRB includes the PSB Director, CIO, and Executive Services Director.

**Evaluation and Feedback:** Agencies will receive evaluation results for each of their concepts. The results will include the decision reached by the PRB and feedback to incorporate into the full proposal, if approved to move forward to Gate 2. The feedback, or plan to address feedback, must be incorporated into the full proposal in Gate 2.

Please see page 5 for a chart outlining the process steps in Gate 1.

### Gate 2: Full Proposal Review (July – August)

Concepts approved during Gate 1 should prepare a full proposal for Gate 2 between March and June 27.

**Forms:** All Gate 2 proposals must submit a Capital Appropriation Proposal (CAP), Benefit Achievement Plan (BAP), and Cost Template. Any feedback provided to the agency at Gate 1 must be addressed in Gate 2 materials.

**Decision Making:** A review team consisting of PSB and KCIT staff will evaluate the CAP, BAP, and cost template.

**Evaluation Results:** Participating agencies will receive evaluation results for their full project proposals. The results will include whether the proposal moves to Gate 3 (Council Review) and any feedback to incorporate in final project design.

Please see page 6 for a chart outlining the process steps in Gate 2.

### Gate 3: Council Review (September – November)

Projects approved in Gate 2 will be included in the Executive Proposed Budget transmitted to Council on September 23, 2025.

## Resources

### [IT Customer Success Manager \(CSM\)](#)

Agencies should contact their assigned IT CSMs with any new investment needs or additional appropriation request for existing projects. IT CSMs can provide support during concept development and full proposal development.

### PSB Analyst

Agencies should contact their PSB analyst with any new investment needs or additional appropriation request for existing projects. PSB analysts can provide a financial perspective during concept development and full proposal development.

### IT Investment Process Manager

If you have questions about the process or are unsure of who to contact, reach out to [Sierra Anderson](#).

### On-Demand Service

The on-demand service includes support from KCIT for each aspect of the proposal development. The on-demand service provides an experienced business systems analyst (BSA) who will apply best practices in eliciting business needs and liaising with technology experts to help inform the project plan. For more information, please see the [FAQs](#) or contact your [IT CSM](#).

### [Cost Builder worksheet](#)

Not required. This worksheet is intended to inform the total cost estimate for the cost template. The worksheet is designed to help agencies capture their assumptions and identify the types and the level of resources necessary to carry out the project.

### [Sizing Chart](#)

The sizing chart is used to determine an estimated project size and whether a project should go for a phased appropriation. The guideline is based on a project's ballpark estimated value and duration.

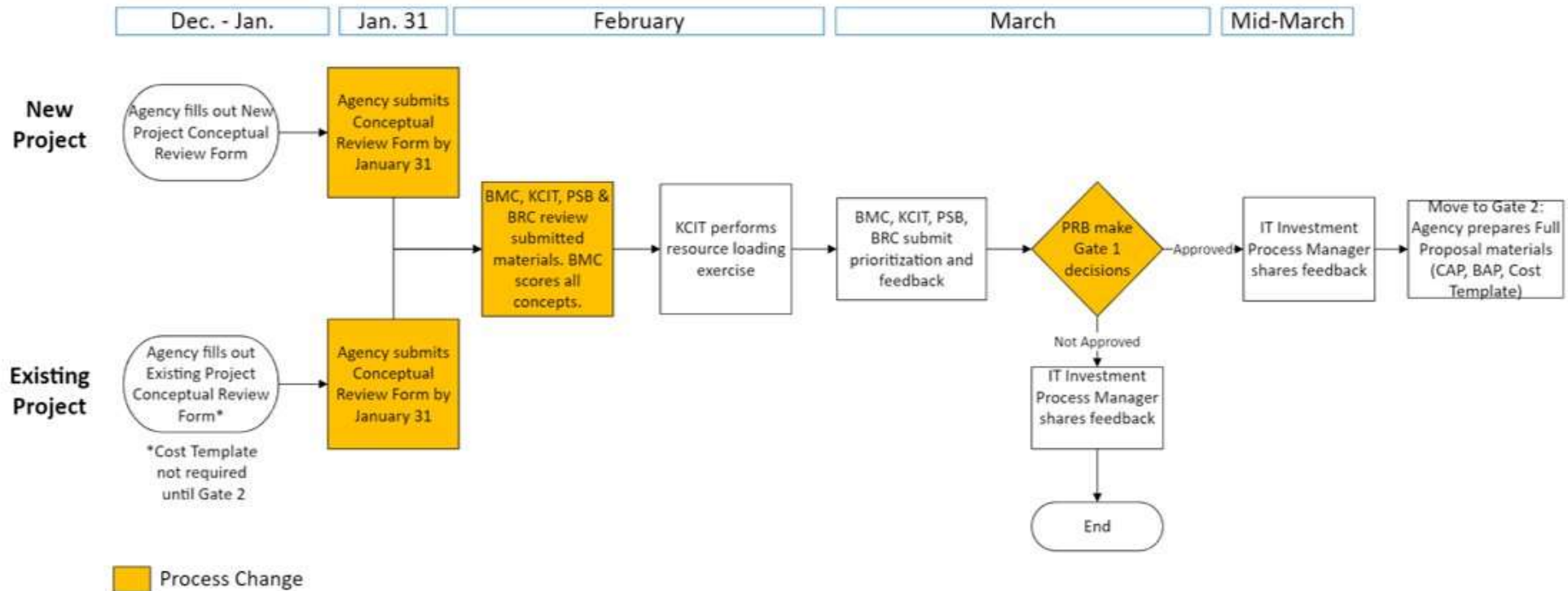
### [Complexity Matrix](#)

Not required. The complexity matrix can help agencies assess project complexity and determine whether the project should go for a phased appropriation.

### [FAQs](#)

Frequently asked IT Investment Process questions grouped by common themes.

## GATE 1



## GATE 2

March - June

June 27

July

Early August

Mid August

September 23

**New &  
Existing  
Projects**

