INFORMATION TECHNOLOGY (IT) INVESTMENT THRESHOLDS AND REQUIREMENTS

The following definitions are intended as guidance only. There will be technology investments that due to the size or scope of the project, its operational impact, or likely stakeholder interest will require a unique approach. Consult your IT Service Delivery Manager and PSB analyst when questions arise.

1) DEFINTION OF A TECHNOLOGY INVESTMENT PROJECT:

❖ Any one-time technology investment (except equipment replacement investment – see below) which will add a new system, replace or upgrade an existing system, or impact business operations. This includes Software-as-a-Service vended projects.

❖ The required budget documentation varies depending on the size of the total investment and whether it is an existing or new appropriation.

IT Investments - Other than Equipment Replacement and O&M of Existing Applications

APPROPRIATION	PROJECT (New/Existing)	PHASED APPROPRIATION	PROCESS & DOCUMENTATION REQUIREMENTS BY THRESHOLD		
			> $250K	$100K-$250K	< $100K
Existing Operating Appropriation	New		- Regular budget process (no Conceptual Review). - Full IT documentation for PSB (no Council transmittal).	No IT budget documentation required. Only monthly status reporting in PPM Pro.	No budget documentation or reporting required.
Existing Capital Construction Appropriation	New, IT Subproject		-Full IT documentation for PSB (no Council transmittal).	No IT budget documentation required. Only monthly status reporting in PPM Pro.	No budget documentation or reporting required.
New Appropriation (Capital or Operating)	New		- Full IT investment process (including Conceptual Review). - Full IT documentation for Council transmittal.	Regular budget process. **AND** Monthly status reporting in PPM Pro.	
	Existing	Yes, Phased Appropriation Project			
		No, Not Phased Appropriation Project	- PRB review/endorsement. - Gate 2 of the IT investment process. - Full IT documentation for Council transmittal.		

2) DEFINITION OF IT EQUIPMENT:

Physical hardware and peripherals that are part of a department's equipment replacement plan. **The IT equipment category should not be used for projects that are likely to have a high level of stakeholder interest.**

Equipment Replacement Project Requirements

Appropriation	REQUIREMENTS
New Appropriation (Capital or Operating)	- Regular budget/appropriation request. - Equipment replacement plan.
Existing Operating Appropriation	- No budget request required. - Equipment replacement plan.