



# Budget Request for IT

New EBO Form 7 for Information Technology

Presented by: Mason L. Tanaka  
*Director, IT Strategic Planning & Policy*  
Office of Information Technology

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# Overview

- Secretary of IT Opening Statement
- Office of Information Technology
- Statutory Obligations
- Goals
- Budget Request For IT
- Way Forward
- Support
- Questions and Answers



# OIT Overview

- Act 2013-68 (SB117) Created:
  - Office of Information Technology
  - Secretary of IT
- Policy, Not Service Delivery
- Mr. Brunson White Appointed as Secretary on April 2013
- First Time for a Cabinet Level Position for IT
- Numerous Statutory Obligations

# OIT Statutory Obligations

“The [IT Strategic] plan shall be developed **in conjunction with the planning and budgeting processes for state agencies** and may include review of state agencies' information technology plans, capital budgets, and operating budgets as appropriate”

*Source: Code of Alabama, Act 2013-68 §4, Para 1*

# OIT Statutory Obligations (cont).

“Establish and administer a structured system for review and approval of new information technology initiatives and projects, including business case, cost benefit analysis, and compatibility analysis.”

*Source: Code of Alabama, Act 2013-68 §4, Para 6*

# OIT Statutory Obligations (cont.)

“Plan and coordinate Information Technology activities for state agencies in such a manner as to promote the most economical and effective use of state resources.”

*Source: Code of Alabama, Act 2013-68 §4, Para 11*

# OIT Goals

- Satisfy Statutory Obligations
- Identify and Review Agency IT Budgets
- Use Existing Budgeting Cycle
- Incorporate Into Existing Processes Where Possible
- No Changes to Existing EBO Forms



# Budget Request for IT - Overview

- Coordinated w/ EBO
  - Incorporate into BR Instructions
  - Forms on EBO Website
- No Change to Existing EBO Forms
- Part of Agency Budget Request
- Beginning with FY2016 Budget Cycle



# EBO Form 7

- MS Excel Workbook
- 3 Tabs (Sheets)
- Roll-up in “Total IT” Tab (Non Modifiable)

State of Alabama EBO Form 7 - Information Technology		Agency IT Budget Request	
Agency Name:	1	Agency CAS No.:	2
		Agency CAS Org. No. (Optional):	3
Agency Contact Information			
Name:	4	Agency IT Budget Request	
Title:	5	Total Other IT Budget - IT Costs not related to IT Projects (Excluding IT Projects Submitted Separately)	
Phone:	5		
E-mail:	5		
Object Code	Object Definition	Requested 2016 (Whole Dollars)	
0100	Personnel Costs	1	
0200	Employee Benefits		
0300	Travel-In-State		
0400	Travel-Out-Of-State		
0500	Repairs and Maintenance		
0600	Rentals and Leases		
0700	Utilities and Communication		
0800	Professional Services		
0900	Supplies, Materials and Operating Exp		
1000	Transportation Equipment Purchases		
1100	Grants and Benefits		
1200	Capital Outlay		
1300	Transportation Equipment Purchases		
1400	Other Equipment Purchases		
1500	Debt Service		
1600	Miscellaneous		
<b>Op</b>			
a. IT State Staff with IT Classifications (FTE)			
b. State Staff doing IT functions (FTE)			
c. Ancillary or Support State Staff (FTE)			
d. Contract Staff			
Object Code	Object Definition	Budgeted 2015 (Whole Dollars)	Requested 2016 (Whole Dollars)
0100	Personnel Costs	4	5
0200	Employee Benefits		
0300	Travel-In-State		
0400	Travel-Out-Of-State		
0500	Repairs and Maintenance		
0600	Rentals and Leases		
0700	Utilities and Communication		
0800	Professional Services		
0900	Supplies, Materials and Operating Exp		
1000	Transportation Equipment Purchases		
1100	Grants and Benefits		
1200	Capital Outlay		
1300	Transportation Equipment Purchases		
1400	Other Equipment Purchases		
1500	Debt Service		
1600	Miscellaneous		
Total Project Cost/Expenditures		\$	\$
<b>Project Staffing (FTE) Duration of Project - (Two Decimals)</b>			
a. IT State Staff with IT Classifications (FTE)			
b. State Staff doing IT functions (FTE)			
c. Ancillary or Support State Staff (FTE)			
d. Contract Staff			
Project Staffing Totals		0.00	0.00



# EBO Form 7 – Coversheet Tab

- General Agency Information
- Can Be Submitted by:
  - Agency (Agency No.)
  - Division (Org No. - Optional)
- All Other Tabs Subordinate to Coversheet

# EBO Form 7 – Coversheet Tab

State of Alabama EBO Form 7 - Information Technology	<b>Agency IT Budget Request</b>		
<b>Agency Name:</b>	1	<b>Agency CAS No.</b>	2
<b>Agency CAS Org. No. (Optional)</b>			3
<b>Agency Contact Information</b>			
<b>Name</b>	4		
<b>Title:</b>	5		
<b>Phone:</b>	5		
<b>E-mail:</b>	5		



# EBO Form 7 – Other IT Tab

- All Non-Project Budgeted IT Expenditures
  - By Major Object
  - For Entire Agency, Not Just IT Function
- IT Related Staff by FTE
  - IT Classifications
  - Staff Engaged in IT Related Functions
  - Support Staff (i.e. ASAs)
  - IT Contractors Providing Direct Support (Staff Augmentation)



# EBO Form 7 – Other IT Tab

State of Alabama EBO Form 7 - Information Technology	Agency IT Budget Request	
	Total Other IT Budget - IT Costs not related to IT Projects (Excluding IT Projects Submitted Separately)	
Object Code	Object Definition	Requested 2016 (Whole Dollars)
0100	Personnel Costs	1
0200	Employee Benefits	
0300	Travel-In-State	
0400	Travel-Out-Of-State	
0500	Repairs and Maintenance	
0600	Rentals and Leases	
0700	Utilities and Communication	
0800	Professional Services	
0900	Supplies, Materials and Operating Exp	
1000	Transportation Equipment Operations	
1100	Grants and Benefits	
1200	Capital Outlay	
1300	Transportation Equipment Purchases	
1400	Other Equipment Purchases	
1500	Debt Service	
1600	Miscellaneous	
<b>IT Operations Total</b>		\$ -
<b>Operations IT Staffing (FTE) - (Two Decimals)</b>		
a. IT State Staff with IT Classifications (FTE)		2
b. State Staff doing IT functions (FTE)		
c. Ancillary or Support State Staff (FTE)		
d. Contract Staff		
<b>IT Operations Staffing Total</b>		0.00



# EBO Form 7 – IT Project Tab

- IT Projects or Initiatives Over \$250k
  - 10 Tabs (Proj 01 – Proj 10)
  - By Major Object
  - For Agency IT Projects
- IT Project Related Staff by FTE
  - IT Classifications Working on Project
  - Other Staff Engaged in IT Project Functions
  - Project Support Staff (i.e. ASAs)
  - IT Contractors Providing Direct Project Support (Staff Augmentation)
- Project Priority Represents All Agency Reported Projects

# What Is A Project?

- New or Ongoing Major IT Endeavors That...
  - Increase the effectiveness or efficiency of business processes by applying information technology or using IT to comply with new requirements of business functions.
  - Major investments in IT services, hardware, or software or applications.



# EBO Form 7 – IT Project Tab

State of Alabama EBO Form 7 - Information Technology	<b>Agency IT Budget Request</b>		
	<b>Ongoing and Planned IT Projects</b> (Submit each IT Project on a Separate Tab)		<b>Project #</b>
<b>IT Project Budget Information</b>			
<b>Project Title/Name:</b>	1	<b>Start Date:</b> (MM/DD/YYYY)	2
<b>Project Description:</b>	3	<b>Completion Date:</b> (MM/DD/YYYY)	4
<b>Project Priority :</b>	5	<b>Total Project Costs:</b> (Whole Dollars)	6
		<b>Total Costs to Date:</b> (As of 9/30/2014)	7
<b>IT Project Budget Information</b>			
<b>Object Code</b>	<b>Object Definition</b>	<b>Budgeted 2015</b> (Whole Dollars)	<b>Requested 2016</b> (Whole Dollars)
0100	Personnel Costs		
0200	Employee Benefits	8	9
0300	Travel-In-State		
0400	Travel-Out-Of-State		
0500	Repairs and Maintenance		
0600	Rentals and Leases		
0700	Utilities and Communication		
0800	Professional Services		
0900	Supplies, Materials and Operating Exp		
1000	Transportation Equipment Operations		
1100	Grants and Benefits		
1200	Capital Outlay		
1300	Transportation Equipment Purchases		
1400	Other Equipment Purchases		
1500	Debt Service		
1600	Miscellaneous		
<b>Total Project Cost/Expenditures</b>		\$ -	\$ -
<b>Project Staffing (FTE) Duration of Project - (Two Decimals)</b>			
a. IT State Staff with IT Classifications (FTE)			
b. State Staff doing IT functions (FTE)		10	
c. Ancillary or Support State Staff (FTE)			
d. Contract Staff			
<b>Project Staffing Totals</b>		0.00	0.00



# Way Forward

- Release with EBO BR Instructions
  - Mid-Sep 2014
  - FY2016 Budget Request Cycle
- STAARS Incorporation
  - Performance Budgeting Module
  - FY2017 Budget Request Cycle
- Operations Plan Forms
  - In Development
  - FY2016 Operations Planning Cycle
- Provide Support to Agencies

# Support

- Agency IT Director
- Office of Information Technology
  - Presentation Posted on Website
  - FAQ on Website – “Library” Link
    - [www.oit.alabama.gov/documents/ITbudgetfaq.pdf](http://www.oit.alabama.gov/documents/ITbudgetfaq.pdf)
- Rick Boyce
  - [Rick.Boyce@isd.alabama.gov](mailto:Rick.Boyce@isd.alabama.gov)
  - (334) 353-3447





# Questions and Answers



# Office of Information Technology

RSA Union

100 North Union Street, Suite 980

Montgomery, Al 36130

334.242.7360

Website: [www.oit.alabama.gov](http://www.oit.alabama.gov)

Email: [infoOIT@governor.alabama.gov](mailto:infoOIT@governor.alabama.gov)

