

Getting Started

1. How do I know if I need to involve EIS on an IT investment or project?

IT investments that meet policy thresholds must be submitted to EIS for review and consideration for further oversight. If you are unsure whether your investment has an IT component or meets policy thresholds, reach out to your policy area Senior IT Portfolio Manager (SIPM).

- See IT Investment Oversight [Policy 107-004-130](#)
- See IT Investment Oversight [Procedure 107-004-130 PR](#)

While EIS Project Portfolio Performance (EIS-P3) may not be required to review the investment, EIS Cyber Security Services (EIS-CSS) may need to review the IT investment from a security perspective.

2. Who do I work with?

Reach out to your SIPM and they will guide you through the process. More information about IT investment consultation can be found on the [About Us](#) page on our website.

3. When do I need to engage?

You should reach out to your SIPM once you determine that an IT investment is necessary or when an IT project is being initiated.

4. How do I engage?

The best place to start and for questions is with your SIPM. If the investment is clearly a non-project investment, you can submit the [IT Investment Form](#) (ITI form) to the EIS ITI Mailbox (itinvestment.review@das.oregon.gov). The ITI form includes helpful information at the bottom to help guide you on how to complete this form. Your SIPM will then review and determine whether further EIS-P3 oversight is required and indicate individuals from other areas within EIS who will need to be involved (i.e., Cyber Security Services, Strategy and Design, Shared Services).

5. What are the different types of investments?

There are different types of IT investments. Definitions of are described below:

- **Non-Project:** An IT investment which may include purchases, subscriptions, contracts, contract amendments, contract renewals, etc. Our [Non-Project Oversight Guide](#) provides step-by-step instructions for how to submit non-project investment requests requiring EIS oversight and should answer many questions related to how these investments are handled. If after reviewing this guide you still have questions, please contact your SIPM.
- **Project:** Project means “a temporary endeavor undertaken to create a unique product, service, or result”. Typically, projects have project managers assigned, are approved by agency governance, and are officially chartered. Our [Project Oversight Guide](#) provides step-by-step instructions for how to navigate the project oversight and Stage Gate process. If after reviewing this guide you still have questions, contact your SIPM.
- **Program:** Program is “defined as a group of related projects, subsidiary programs, and program activities managed in a coordinated manner to obtain benefits not available from managing them individually”. Programs may include any number of project and non-project investments. For questions about programs, contact your SIPM.

IT Investment (ITI) Form

6. How do I describe scope or cost estimates if a solution is not yet known?

Please provide as much information as you know at this time and describe any uncertainty or assumptions you have relied upon to provide estimates. If the effort resulted from a Policy Option Package (POP) for instance, how did you arrive at the costs described there.

7. Does the ITI form need to be updated if more becomes known about the investment after it has been submitted?

No. Submission of the ITI form is a means to engage EIS for IT investment consultation and understand the nature of the investment. It is expected that further details will become known as the investment process continues. More information about IT investment consultation can be found on the [About Us](#) page on our website.

8. What needs to be included in the total investment cost?

All costs associated with the investment, including purchase or development of the solution (both hardware and software), vendor services, procurement or DOJ charges, licensing, personnel cost (IT and non-IT), and ongoing maintenance and operational costs for five years. If solution is not yet known, calculate costs using as much information as is known and describe any uncertainty or assumptions relied upon to provide estimates. One-time costs should be broken out into “Hardware”, “Software”, and “Personnel (Project)”. Both State and contractor personnel should be included in the “Personnel (Project)” category. Operating costs should cover 5 years of expected recurring costs. Though not itemized individually on the form, operating costs should also include hardware, software, and personnel costs. Further information may be found within the [Project Oversight Guide](#) or [Non-Project Oversight Guide](#) depending on the type of investment.

9. What if the investment term is less than 5 years?

Calculate the total investment cost for the period of the investment and note the term on the ITI form.

10. What other materials need to be provided along with the ITI?

If a draft amendment or purchase order is available, it is helpful to provide that information along with the ITI form. In some cases, it is helpful to see the original contract or other procurement materials. If the investment is cloud hosted, a Cloud Workbook may be needed. Please reference the Cloud [Policy 107-004-150](#) for guidance.

General IT Investment Questions

11. Where can I find templates or guidance on developing project artifacts?

Agencies are responsible and accountable for project management plans and practices. While EIS provides templates for some project initiating documents, such as the business case and charter, using these templates is not mandatory. The only templates EIS requires are the ITI form and Initial Complexity Assessment. These materials can be found on our [Guidance and Forms](#) page on our website.

Agencies may also leverage various communities of practice, such as the Oregon Project Management Advisory Board (OPMAB), Project Management User Group (PMUG), Business Analyst Networking Group (BANG) and others to seek other project management templates and artifacts to use as examples.

12. Does EIS still need to review contract amendments that have no cost adjustment?

Yes. Amendments to IT contracts must be reviewed by EIS if the investment is subject to EIS oversight policies, regardless of whether there is an adjustment to the overall contract cost.

13. Does EIS need to review renewals or extensions of previously approved investments?

Yes. Renewals and extensions to IT investments previously reviewed and approved by EIS must be submitted for re-review and approval unless a longer-term approval has been granted. See the [Non-Project Oversight Guide](#) for more information about longer-term approvals.

14. Are public-private partnerships subject to oversight consideration?

Oversight may be required for any IT investment by state agencies not specifically exempted in the policy. IT investments developed or procured in partnership with other entities are subject to EIS review and approval. Consult with your SIPM to confirm whether an investment should be reviewed by EIS.

15. Does EIS need to be involved in solicitations/procurements even before a solution is selected?

Yes. The ITI form should be submitted at the time the investment begins. This prompts ITI consultation with your SIPM and engagement with an EIS Business Security Advisor (BSA) to review contract terms and conditions. An EIS Senior IT Oversight Analyst (OA) will be engaged later as you will need EIS-P3 approval prior to releasing a request for proposal (RFP) and signing a contract or purchase order.

16. My project is complete, but I need to renew licensing or spend money to continue contracted services supporting the solution. How do I do this?

These ongoing investments are usually considered part of maintenance and operations. Consult with your SIPM to determine whether the investment meets requirements to be reviewed by EIS and whether it should be treated as a project or non-project investment.

17. What is the expected timeframe for EIS responses and review of documents?

Each time materials are submitted to EIS for review, we have an expected timeframe of 10 business days to respond or return feedback. Some EIS resources may require a longer review period based on the number of documents submitted, length of documentation, and overall workload of EIS staff. If review and feedback cannot be provided within 10 business days, we will notify you of the expected turnaround by email. The response target should not be considered a guarantee of total review time.

18. What is the Agency Maturity Assessment and how is it used?

More information about the Agency Maturity Assessment can be found within the [Project Oversight Guide](#).

19. Where can I find information about the biennial Enterprise IT Project Prioritization process?

The Enterprise IT Project Prioritization process ties into the biennial budget planning cycle. Information can be found on the [Guidance and Forms](#) page on our website.