

Policy 113 – Technology Business Management (TBM)

PURPOSE

This policy establishes expectations for agencies identified to participate in the state Technology Business Management (TBM) program. This program provides data analytics that agencies and the Office of the Chief Information Officer (OCIO) can use to identify opportunities for savings and efficiencies of IT expenditures plus monitor ongoing financial performance of technology investments as identified in [RCW 43.105.054 Section 2\(f\)](#) and in accordance with [RCW 43.105.205 Section 3, 4](#). While the RCW mandates agencies with annual IT Expenditures exceeding ten million dollars (\$10,000,000) participate in the program, this policy expands involvement to include agencies with IT Expenditures exceeding \$250,000 in order to maximize program benefits

POLICY STATEMENT

1. Agencies with annual [IT Expenditures](#) equal to or exceeding \$250,000 must categorize IT expenditure using the program taxonomy and reporting solution in accordance with Standard 113.30 and Standard 113.40.
 - a. Agency participation in the program will be based on prior fiscal year IT Expenditures reported in the state enterprise accounting system.
2. Agency [categorization](#) for the next fiscal year must be completed and submitted to the OCIO TBM Program office by no later than 30 calendar days after Office of Financial Management AFRS/CAFR Closing Schedule - Phase 2 cutoff.
3. Agencies shall reconcile their IT Expenditures data at a minimum, 6 months after submission in step 2 above, to ensure information is accurate and take corrective actions if warranted by the review.

Roles and Responsibilities

Office of the Chief Information Officer

1. Each fiscal year, within 5 days of Office of Financial Management AFRS/CAFR Closing Schedule - Phase 2 cutoff, the OCIO will publish a [list of agencies](#) required to categorize and submit their proposed IT expenditures as reported in the enterprise accounting system, for the upcoming year.
2. The OCIO will coordinate timely and accurate uploads of [enterprise datasets](#) into the TBM program reporting solution.

3. The OCIO will coordinate uploads with agencies wishing to load non-enterprise, agency specific data.

Agency

1. Agencies with annual IT Expenditures equal to or exceeding \$250,000 must identify and categorize IT Expenditures using the approved TBM [taxonomy](#).
2. Agencies must identify the [TBM cost center](#) attributes they use in the program as captured in the state enterprise accounting system.
3. Agencies can update IT expenditure categorization at any point in the fiscal year to meet changes in the business.
4. Agencies are responsible for the accuracy of agency specific data.

CONTACT INFORMATION

Contact [OCIO Policy & Waiver Mailbox](#) for additional information or to [request a waiver](#).

SUNSET REVIEW DATE: June 30, 2024

ADOPTION DATE: TBD

TECHNOLOGY SERVICES BOARD APPROVAL DATE: TBD

APPROVING AUTHORITY:

William S. Kehoe, Chief Information Officer
Chair, Technology Services Board

Standard 113.10 – IT Expenditure Data Provision Standard

STANDARD STATEMENT

The OCIO TBM Program is responsible for managing and monitoring the load of the following Enterprise datasets extracted monthly from the statewide systems and used by the program:

- AFRS (Agency Financial Reporting System)
- CAMS (Capital Asset Management System)
- HRMS (Human Resource Management System)

CONTACT INFORMATION

Contact [OCIO Policy & Waiver Mailbox](#) for additional information or to [request a waiver](#).

SUNSET REVIEW DATE: June 30, 2024

ADOPTION DATE: TBD

TECHNOLOGY SERVICES BOARD APPROVAL DATE: TBD

APPROVING AUTHORITY:

William S. Kehoe, Chief Information Officer
Chair, Technology Services Board

Standard 113.30 – TBM Taxonomy Standard

STANDARD STATEMENT

Agencies within the program must follow the published TBM taxonomy for IT Services, Technology Towers and Cost Sources made available by the TBM Council Board Committee on Standards. [Link to published taxonomy](#).

- During the first quarter of each fiscal year, the program will review published standards and establish a timeline to incorporate any changes made to the TBM taxonomy. All efforts will be made to incorporate taxonomy changes at beginning of the fiscal year.

CONTACT INFORMATION

Contact [OCIO Policy & Waiver Mailbox](#) for additional information or to [request a waiver](#).

SUNSET REVIEW DATE: June 30, 2024

ADOPTION DATE: TBD

TECHNOLOGY SERVICES BOARD APPROVAL DATE: TBD

APPROVING AUTHORITY:

William S. Kehoe, Chief Information Officer
Chair, Technology Services Board

Standard 113.40 – TBM Reporting Solution Standard

STANDARD STATEMENT

The reporting solution used within the TBM Program to track, monitor and report IT expenditures is from Apptio, Inc.

CONTACT INFORMATION

Contact [OCIO Policy & Waiver Mailbox](#) for additional information or to [request a waiver](#).

SUNSET REVIEW DATE: June 30, 2024

ADOPTION DATE: October 10, 2019 TBD

TECHNOLOGY SERVICES BOARD APPROVAL DATE: TBDTSB Meeting

APPROVING AUTHORITY:

William S. Kehoe, Chief Information Officer
Chair, Technology Services Board