Office of Information Technology
Tactical Planning Process FAQs

Resources

Our State's Intranet site address can be found at: https://www.tech.nj.gov/it/whatwedo/tpu/.

You will find an overview of our process, our templates and FAQs on both the OIT Tactical Planning Process and Tactical Plan Number Assignment for your reference.

Timeline & Process

Please note Tactical Planning documents are due 90 days from the start of the new fiscal

OIT Tactical Planning Unit (OIT TPU) will send the following notifications:

1. Annual Process Kick Off
2. Initial request for individual Agency information
3. Reminders

Each Agency will be asked to submit back to us:

1. The IT Operational System Maintenance, Support & Refresh Costs Plan
    a. This is a line item by line item estimate of costs for the above for the current and next 2 fiscal years
2. Project Portfolio Status Sheet – a report calling for detailed information on each Agency project which now captures a summary of the current and anticipated annual costs for the next 3 years covering:
    a. Total Projected Annual for each individual project

IT Operational System Maintenance, Support & Refresh Costs Template

This document must be completed for all projected IT Operational System Maintenance, Support & Refresh Costs. This form can be filled out in either the Word or Excel format.

(A) Plan Definition

(B) Basic Information:

- Tactical Plan Number
- Start Date
- End Date

(C) Funding:

- Enter the estimated cost for the current FY and next two FYs by Funding Source.

(D) Procurements:

1. Provide information for the categories listed.
2. Any procurement for a category listed that will be $25,000 or greater must be listed as a separate line item. Procurements that will be less than $25,000 can be grouped together into the appropriate category. If necessary, add additional information as requested.
3. This Tactical Plan Number for this must end in 0001.
4. The Checklist asks for a description on how the procurement aligns to the Plan. When completing the Checklist please be sure to include the line item that pertains to the procurement.

5. This form is to be used to document an Agency's "Non Project" System Maintenance and Support costs. Costs that are needed to maintain IT systems that support day to day operations, whether that be to maintain existing systems or replace systems at the end of or the scheduled end of their life cycle.
6. Procurements should not be aligned in any manner to work that would be defined as being that of a project.
    a. The definition of a project is: A temporary effort to create value through a unique product, service, or result. All projects have a beginning and an end. They have a team, a budget, a schedule, and a set of expectations the team needs to meet. Each project is unique and differs from routine operations—the ongoing activities of an organization—because projects reach a conclusion once the goal is achieved.
    b. Projects can be done as a whole or in phases, any costs associated whether done in either manner would be considered a project cost and should not be confused with costs documented here that are necessary to maintain day to day operations.

OIT Project Portfolio Project Funding Status Sheet

Column	Needed (Yes/No)	If Yes, Action Needed
A.	N	Auto generated
B.	Y	Dept./Agencye- Select the Dropdown
C.	Y	Exec. Sponsor - Update if blank
D.	Y	Initiative/Project Name - Provide if blank, update as needed
E.	Y	Tactical Plan/Tracking Number - Provide if blank, update as needed.
F.	Y	Project Description - Provide if blank, update as needed
G.	Y	Project Type – Select the project type that most accurately fits the strategic category
H.	Y	Agency Project Manager - Provide if applicable, update as needed
I.	Y	OIT Contact Person – If an applicable OIT resources has been assigned.
J.	N	OIT PMO Recommendation – **OIT Use Only** - OIT is recommending certain projects be removed or closed due to multiple factors.
K.	N	Reason for Recommendation - **OIT Use Only** - If closing and/or removing project is recommended, explanation is provided.
L.	Y	Agency Response - The Agency must confirm removal, or, provide a reason to keep the project Open and Active.
M.	Y	Status/Continuance - Select the appropriate answer from the dropdown
N.	Y	Status/Continuance - Select the appropriate answer from the dropdown
O.	Y	Status/Continuance - Select the appropriate answer from the dropdown
P.	Y	Status/Continuance - Select the appropriate answer from the dropdown
Q.	Y	Architectural Review – Select Yes or No if the project has been submitted to SAR
R.	Y	BCR/CSAR/TIP - Enter the date the BCR/CSAR/TIP was held
S.	Y	LSAR - Enter the date the LSAR was held
T.	Y	PSAR - Enter the date the PSAR was held
U.	Y	IR - Enter the date the IR was held
V.	Y	Work Description - Describe the work done in the current fiscal year
W.	Y	Work Description - Describe the work to be done in the upcoming fiscal year
X.	Y	Start Date - Enter the Start Date of the project if blank
Y.	Y	End Date - Enter the best estimated end date currently available
Z.	Y	Total Cost – Enter the total projected cost of the project from start to end
AA.	Y	Funds FY – If applicable, enter the projected funds for the upcoming fiscal year
AB.	Y	Funds FY+1– Enter the projected funds for the upcoming fiscal year
AC.	Y	Funds FY+2 - If applicable, enter the projected funds for the upcoming fiscal year
AD.	Y	Out Year Spending – Update if blank
AE.	N	Total Coste- OIT Use Onlye- Auto Calculates; do not modify
AF.	N	% IT Budget – OIT Use Only – Auto Calculates; do not modify
AG.	Y	Notes – Any additional information that may be beneficial

Additional Workbook Instructions

Category	Instruction Details
All applicable fields	Please make every effort to ensure the existing data is accurate and please complete all the information requested as applicable to the project. Incomplete or missing information may cause a project to be closed, requiring a new tactical plan number if reactivated. Any missing and a delay in approval of a procurement request for additional information.
HEADER	
Yellow Headers	OIT Use Only - Please do not modify or overwrite the information in these columns
Blue Headers	Agency Completion - Please validate information entered as accurate and provide the information requested where the fields are blank and as applicable to the project.
CELLS	
All Cells	Please do not split a cell into multiple cells. Please use 'Alt+ Enter' for creating new line in same cell. Please select from the drop downs as applicable.
Cells, Columns or Rows	Please do not merge cells, columns or rows
COLUMNS	
Columns B, G, & M - P	Please choose the appropriate selection from the dropdown; please do not manually overwrite the selection
Column E	Please limit this to the most current tactical plan number. Please do not reference the "old Tactical Project ID aka Tracking ID" here. Please reference that and/or any additional information in Column AL 'Notes'
Column P	Active/ Closed is project status based on Columns M - O. Choose status appropriately.
Column X & Y	Do not write multiple dates or text in any 'date columns'.
Column AG	Use the 'Notes' Column to provide additional information (eg: old Tracking ID, other comments, references, etc.).
Columns AA-AC	This information if not completed for every active project can delay the approval of a procurement request at first review by OIT Tactical Planning
All Columns	Please do not merge or split columns
All Columns	Please do not overwrite/change/modify any column or dashboard settings. The input provided is being lifted in same format to prepare 'State Level Statistical reports.
TABS	
Agency/Contact	Please complete if any of the contacts for your Agency's Tactical Planning process have changed

Tactical Plan Number Assignment

Q: Who assigns Tactical Planning numbers in OIT?
A: Tactical Plan Number assignment for OIT Sponsored Projects is managed by the OIT Tactical Planning Unit (OIT TPU).

Q: Why are we required to or what is the reason for getting a Tactical Plan number assigned?
A: Tactical Planning is a subset of Strategic Planning and therefore tied to the Budget. A project's funding is tied to the Agency's Tactical Plan.

Q: Who is responsible for assigning a Tactical Plan Number to my project?
A: If a project is sponsored/funded by your Agency, or an Agency other than OIT, the sponsoring Agency would assign the Tactical Plan Number.

Q: How do I know who to contact in my Agency to have a number assigned?
A: If you are having difficulty obtaining that information and need assistance finding a contact within your Agency, please feel free to contact us at OIT.workrequest@tech.nj.gov. We will do our best to assist you by reaching out to our contacts to see if they manage that or can point you in the right direction.

Q: How do I get a number assigned?
A: If you have an OIT sponsored project that requires a Tactical Plan number:

1. Have entered the project in as Work Intake or have contacted Solutions Management, they would then forward a request to OIT TPU for a number to be assigned.
2. Have not entered the project in as Work Intake, you can contact us directly. Please fully complete a Project ID Request form and email that to the OIT TPU at OIT.workrequest@tech.nj.gov.

Q: If I have submitted my project to SAR without a Tactical Plan number, and as a result they require one be assigned, do they order that for me?
A: No; you will need to do that, but the first step to doing that is verifying who is sponsoring or funding the project.

Q: What if the project is funded by a source other than the State Agency?
A: The State Agency would still be considered the sponsor of the project and therefore would need to assign the Tactical Plan number.

Q: Is there a standard naming convention that should be used when assigning a Tactical Planning number?
A: Yes

- The number consists of **10** characters:
  - The first 3 characters are the NJCFS Agency Code (reference the table below)
  - The fourth character is a lower case alpha character assigned by your agency starting with a and assigned in a consecutive order to units or departments reporting under the Agency
    - Ex: if an Agency has multiple entities, each entity may be distinguished by assigning a new alpha code, see below as an example:

Agency Name	099	a
Agency Name – Underlying Entity 1	099	b
Agency Name – Underlying Entity 2	099	c

  - The fifth and sixth characters are the FY in which the project began.

- The last four numbers are assigned by your agency. The Tracking Number for IT Operational System Maintenance & Support must end in 0001.
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Agency NJCFS Codes

Department / Agency / Commission	NJCFS Agency Code	Alpha character
Agriculture	010	a
Banking & Insurance	014	a
Children & Families	016	a
Civil Service Commission (Formerly Personnel)	062	c
Community Affairs	022	a
Corrections	026	a
Corrections - State Parole Board	026	b
Education	034	a
Education - MKSD (Marie Katzenbach School)	034	b
Environmental Protection	042	a
Health & Senior Services - OC; M&A; Other	046	a
Health & Senior Services - Public Health	046	b
Health & Senior Services - Senior Services	046	c
Human Services	054	a
Labor & Workforce Development	062	a
Public Employment Relations Commission	062	b
Law & Public Safety	066	a
Law & Public Safety - State Police	066	b
Office of Homeland Security and Preparedness	066	c
Military & Veterans' Affairs	067	a
Public Advocate	070	a
State	074	a
Transportation	078	a
Motor Vehicles Commission (MVC)	078	b
Treasury	082	a
Treasury - Board of Public Utilities (BPU)	082	b
Treasury - Casino Control	082	c
Treasury - Office of Administrative Law	082	d
Treasury - Office of Public Defender	082	o
Office of Information Technology (OIT)	082	z

We are here to assist so, please do not hesitate to contact OIT.workrequest@tech.nj.gov with any questions you have.