

**PM-01-04-S**

**State CIO Adopted:** July 19, 2023

**TSB Approved:**

**Sunset Review:**

**Replaces:**

N/A



Washington Technology Solutions

## TIERED OVERSIGHT AND REPORTING STANDARD

**See Also:**

RCW [43.105.054](#) OCIO Governance

RCW [43.105.205](#) (3) Higher Ed

RCW [43.105.020](#) (22) "State agency

RCW [43.105.255](#) Major technology projects and services-Approval

RCW [43.105.245](#) Planning, implementation and evaluation of major projects

**To ensure successful project completion, all major IT projects with WaTech oversight are required to report routine status reports and key project documentation and deliverables using the WaTech's web-based tool available on [Statewide IT Project Dashboard](#) to meet transparency and visibility requirements.**

<b>Content</b>	<b>Tier 3</b>	<b>Tier 2</b>	<b>Tier 1</b>	<b>Responsibility and Frequency</b>
Feasibility Study	Required	Recommended	Agency Discretion	Agency
Project Charter		Required		Agency
Technology Budget		Required		OCIO
Investment Approval		Required		OCIO
Investment Plan		Required (If deemed so by OCIO)		Agency to complete. OCIO to approve & post
QA Plan		Required		QA service provider
QA Readiness Assessment		Required		QA service provider
Agency response to QA findings		Required		Agency
Project Management (PM)		Required	Optional	Agency

Plan				
Associated Project Management Plans	See below			
• Detailed workplan (schedule, work breakdown structure)	Required		Agency discretion to include with Project Charter / PM Plan	Agency
• Procurement Plan	As applicable			Agency
• Vendor Management Plan	Required	Required May be include with Project Charter / PM Plan	Agency discretion to include with Project Charter / PM Plan	Agency
• Project Quality Assurance Plan	Required		Required for projects over \$2M TPPS	Agency
• OCM Plan	Required	As applicable	As applicable	Agency
• Communications Plan	Required	Required May be include with Project Charter / PM Plan	Agency discretion to include with Project Charter / PM Plan	Agency
• Scope management / Change Control plan	Required	Required May be include with Project Charter / PM Plan	Agency discretion to include with Project Charter / PM Plan	Agency
• Project roles and responsibilities	Required	Required May be include with Project Charter / PM Plan		Agency
• Risk and Issue management plan (including RAID log)	Required	Required May be include with Project Charter / PM Plan		Agency
• Test Plan	Required	Required May be include with Project Charter / PM Plan		Agency
• Training Plan	Required		Required May be include with Project Charter / PM Plan	Agency

<ul style="list-style-type: none"> <li>Knowledge Transfer / M&amp;O readiness plan</li> </ul>	Required	Required May be include with Project Charter / PM Plan	Agency
Project Status Reports and health assessment	Required		Agency Monthly for Tier 3 and Tier 2,  Quarterly for Tier 1 projects.
Quality Assurance Reports and project health assessment	Required		QA service provider Monthly for Tier 3 and Tier 2,  Quarterly for Tier 1 projects.
OCIO Project health assessment	Required		OCIO Monthly for Tier 3 and Tier 2,  Quarterly for Tier 1 projects.
Gate certifications and approvals	Required (Gated funding projects only)		OCIO
Go-live readiness criteria and review	Required		N/A
Post Implementation Review Report	Required		Agency
QA Closeout Report and Lessons Learned	Required		QA service provider

## REFERENCES

1. [Statewide IT Project Dashboard](#).
2. [Definition of Terms Used in WaTech Policies and Reports](#).

## CONTACT INFORMATION

- For questions about this policy, please email the [WaTech Policy Mailbox](#).
- For technical assistance, please email the [WaTech Consultants Mailbox](#).