



Early and Ongoing Engagement in Major IT Projects Standard

Introduction

State agencies subject to the Chief Information Officer (CIO) and the Information Services Division (ISD) authority are required to coordinate with OMES Information Services at the earliest stage of any major information technology project. Early and ongoing engagement ensures alignment with statewide standards, enterprise architecture, cybersecurity requirements, accessibility and procurement practices. It reduces risk, duplication and cost across the enterprise and improves outcomes for the citizens of Oklahoma.

Purpose

This standard establishes a mandatory early and ongoing engagement and intake process with OMES Information Services for major IT projects. It defines what constitutes a major IT project, sets minimum engagement activities and identifies responsibilities and process steps for agencies and OMES Information Services throughout concept and planning phases.

Definitions

Major IT project – an initiative that introduces or significantly changes statewide or agency technology capabilities. Examples include enterprise system replacements, statewide platform implementations, cross-agency integrations, significant cloud migrations, significant cybersecurity initiatives or projects that materially affect mission-critical services or regulated data.

Early engagement – the required coordination with OMES Information Services beginning at concept and prior to developing detailed scope, budget, schedule or solicitation materials. This engagement should continue through the scope of the project unless Information Services provides an exemption.

Project Initiation Request – a standardized intake package submitted to OMES Information Services including a concise concept overview, preliminary objectives, stakeholders, anticipated funding source, rough order of magnitude, technology impacts, data classification and initial risk considerations.

Agency – any state agency subject to CIO and ISD authority under Oklahoma law.

Standard

Triggers for mandatory early engagement.

Agencies must initiate early engagement with OMES Information Services when any of the following triggers apply. These triggers help agencies self-identify “major IT projects” and ensure alignment and risk management at concept.

- Total anticipated project value is \$500,000 or greater.
- The project will access, store, host, copy, transmit or otherwise process regulated or sensitive data (e.g., HIPAA PHI, CJIS CJI/OLETS, IRS Publication 1075 FTI, FERPA-protected data, or other federally protected data).
- Introduction of significant new cloud hosting/services (SaaS, PaaS, IaaS) or material changes to existing cloud platforms, including migration of agency systems or data.

- Statewide or cross-agency impact (shared platforms, enterprise system replacement, multi-agency integrations) or any initiative that materially affects mission-critical services.
- Agency office moves to new locations.

Guidelines.

- Early engagement is mandatory. Agencies must engage OMES Information Services during concept development and before discussions with suppliers. If a solicitation is required, engagement is required during concept and before drafting the solicitation.
- Project intake submission is required. Agencies must submit the intake package through the Project Initiation Request as an IT project accessible here: [ServiceNow Project Initiation Request](#).
- Architecture, security and accessibility reviews will be coordinated in partnership with OMES Information Services and documented with guidance and required actions.
- Cybersecurity and data protection requirements must be addressed early. Projects must align to the [State of Oklahoma Information Security Policy, Procedures and Guidelines](#) and related standards.
- Compliance with [statewide IT standards](#) is required. Projects must follow published methodologies, templates and quality practices, including project management standards.
- Exception requests must be in writing and approved by the CIO or by their delegate(s). Agencies seeking exceptions to standards must include justification.
- Documentation must be maintained. Agencies must retain engagement records including intake submission, reviews, decisions and exception approvals in project files.

Process Overview.

1. Agency identifies the IT concept and contacts OMES Information Services via ServiceNow and submits the Project Initiation Request for an IT project.
2. OMES Information Services acknowledges receipt and schedules a discovery session.
3. Architecture, security and accessibility reviews are performed; guidance and required actions are documented.
4. Ongoing coordination plan and sourcing strategy are established.
5. Exception requests, if any, are evaluated and documented.
6. Agency proceeds to planning and, if applicable, solicitation in alignment with the documented guidance. Agency continues to engage with OMES Information Services per the established plan and strategy unless an exception is provided.

Note

All IT purchases require CIO approval at a zero-dollar threshold. Engagement with ISD does not replace ePro or other required approvals; it ensures that architecture, security, accessibility, procurement, and other evaluations occur before scope, budget or solicitation language is finalized.

Compliance

This standard shall take effect upon publication and is made pursuant to Title 62 O.S. §§ 34.11.1 and 34.12 and Title 62 O.S. § 35.8. OMES IS may amend and publish the amended standards policies and standards at any time. Compliance is expected with all published policies and standards, and any published amendments thereof. Employees found in violation of this standard may be subject to disciplinary action, up to and including termination..

Rationale

To ensure efficient, secure, and cost-effective delivery of essential public services, all state agency IT purchases and projects must receive central approval. This allows the Chief Information Officer to evaluate agency needs and capabilities, strengthen data protection and security, and streamline and consolidate systems to reduce costs for taxpayers.

Revision history

This standard is subject to periodic review to ensure relevancy.

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