

IRM PLANNING PROCESS

Purpose: Incorporate IRM planning into the overall OR/WA budget process.  
Ensure coordination with subject-matter specialists and managers.

Audience: IRM community for managing the program.

Notes: State Office IRMs are on the same schedule and level of planning as OR955.  
Budget activities are noted here (italicized) for scheduling reference only; not representative of the full budget process, or exact dates.

Due	Who	Activity	Explanation
3/1	IRMAC Team	Kick off the IRMP planning process. OR955 issues directive.	Review prior year. Improve current year's process.
5/1	Div. IRMs OR955	Submit worksheets to OR955 using direction obtained from senior subject-matter specialists. Prioritize/synopsise.	This information is a heads up for district IRM budget planning, and provides insights for Statewide strategic planning.
5/1	OR955	Issue directive re data calls.	Data calls provide the IT budget information to compare to the 15% guideline.
5/15	IRMAC Team	Review worksheets. Prepare package for Districts.	Identify hot topics and obtain clarifications from Div. IRMs or OR955.
5/30	IRMs OR955	Hold meeting or conference call to discuss the State's overall strategy, the specifics of the direction, and to share information among offices.	Use the worksheet information and personal knowledge to discuss and understand each office's direction, Statewide strategy, etc. Agree on test sites for new initiatives.
6/15	OR955	<i>OR955 develops Operating Plan (OR955 workmonths and budget, OR990 O&amp;M, Off-the-Top issues).</i>	<i>Use information from the planning process to date (worksheets, FUG input, IRMAC discussions, etc.)</i>
6/30	Dist. IRMs	Submit district IRM Plans to OR955. Plans to be signed by District Administrative Officers.	Assure local specialists' awareness of State/National initiatives and their role in supporting these. Assure the district is technologically prepared. This step is key to the District IRM Plan and to identifying Statewide issues.
7/15	IRMAC Team	Develop staffing for OR955 and the OR/WA ITIB.	Analyze district IRM Plans for impacts and trends affecting State strategy, configuration management issues, etc.
7/30	OR/WA ITIB	<i>Hold meeting to discuss budget and strategic direction.</i>	<i>Use information from the planning process to-date to prepare for presentation to the State Budget Committee.</i>
8/1	OR955	<i>Prepare input to the Planning Target Allocation Directives.</i>	<i>Planning Target Allocation Directives contain the Statewide IRM Plan.</i>
9/1	OR955	<i>Review WO Directives and write Oregon-specific directives.</i>	
9/15	IRMAC	IRMAC meeting or conference call to discuss Directives and Off-the-Top outcomes. Put OR/WA <u>IT</u> directives on website (w/ <u>full</u> table of contents).	
1/15	OR/WA ITIB	<i>Hold meeting to prepare for Annual Work Plan (AWP).</i>	<i>Discuss issues and direction. Identify changes for AWP.</i>
2/1	OR955	<i>Prepare input to the Annual Work Plan (AWP).</i>	<i>Annual Work Plan (AWP) contains the Statewide IRM Plan.</i>