

Appendix D - CIO Council Tactical Plan Input Enterprise IRM Strategy – Tactical Plan V1.0

I. Feedback summary from CIO Council

A. Is the “active” list of tactical initiatives/deliverables what we should be working on from your perspective?

We received a few explicit comments about the “active” list:

- Tasks outlined in tab 3 look right on target. (DOC)
- v0.9 Tactical Plan list looks good. (DEQ)
- EIRMS Goals and Objectives are good - the right ones. (ODOT)
- They appear to be the correct activities. (Forestry)
- Can support the draft as written. (ODVA)

Additionally, consider moving up the deliverable deadlines for the ESO initiatives, synchronizing them more closely with the dates agency will be held to. (Forestry)

Note: We will work with ESO to determine what is possible.

B. Are there any other initiatives/deliverables that you believe should be added to the “active” list in the EIRMS Tactical Plan (i.e., major agency IT projects that cross agency or jurisdictional boundaries – perhaps aligned to Objective 2.3: Enable system integration and data-sharing across agency and jurisdictional boundaries)?

Objective 2.3: Systems Integration and Data Sharing – The Department of Education’s K through 12 Integrated Data System (KIDS) Project could be added to the Active list. (Education)

Note: We plan to discuss the addition of several more major IT projects that cross agency or jurisdictional boundaries to the list. Status information on those projects is already provided to EISPD on a quarterly basis via the Major IT Project Quality Assurance reports.

Objective 3.2: Provide cost-effective and reliable online government services – It would be beneficial to add back the “Fully implemented Internet, Intranet and Extranet Standards,” and “Strategy for development, deployment and management of online licensing and compliance systems” initiatives from the Pended list to the Active list. (Forestry)

Note: Staffing and financial resourcing for Obj. 3.2 initiatives would need to be evaluated.

C. Are there any other deliverables you believe should be considered as part of the pending activity/deliverable review process?

No initiatives were explicitly recommended to be moved from the active Tactical Plan to the Pended initiatives list, nor did any respondent suggest new initiatives to be considered as part of the Tactical Plan (by way of the Pended list).

D. Are there any additional goals and objectives you believe should be considered in future revisions of the plan (e.g. Greening of IT)?

Several general goals/objectives were mentioned in the comments that ITIP received from CIOs. These included:

- Specific support for "Green IT" concepts/activities as they align with the Governor’s Sustainability goals and objectives (DAS). Sustainable (Green) IT is a good suggestion, but it will happen (or not happen) regardless of whether it’s on the plan or not. (ODOT)
- Promoting the enterprise perspective as a requirement for supporting agencies’ future IT initiatives – with a focus on faster and easier business solutions, benchmarked costs, and an explicit balance between needs and costs,
- Implementing broader use of CobiT by way of agency-by-agency assessments (ODOT), and
- Need to purposefully drive down the costs of network (and other enterprise) services (OJD).

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E. Do you have any general suggestions for improvement of this or future versions of the Tactical Plan?

- “The format of the Tactical Plan, as well as the highly-condensed initiative names/titles, makes it difficult to evaluate. Clearer descriptions will make the Tactical Plan more useful to those not as familiar with each objective/initiative.” (Revenue, ODVA, DCBS)
- All actions and projects should be continually evaluated in terms of the achievement of EIRMS Goals and Objectives, including:
 - What did we plan to deliver and what was delivered (Revenue, ODOT)
 - How do we measure the completion of initiatives in terms of the achievement of EIRMS Goals and Objectives (and which initiatives might be considered “signature” or bellwether EIRMS initiatives), (Revenue, ODOT)
 - What were/are the benefits to agencies, (Revenue, ODOT)
 - If we missed our goal, what do we plan to do to remedy that, (Revenue, ODOT)
 - Are we undertaking initiatives that are not in the Tactical Plan (and/or EIRMS), and if so what is the resource/opportunity cost of those non-Plan activities (ODOT)
- Refine the methodology of undertaking enterprise actions by way of (ODOT):
 - Linking future budget provision to the accomplishment of Tactical Plan goals/objectives – in essence, this would be an evaluation of the value that was realized through the completion of Tactical Plan initiatives,
 - Reviewing business cases developed in support of initiatives to compare projected benefits and costs against realized benefits and total costs (subsequently, this would allow for the quality of submitted business cases to be evaluated as well),
 - Refining project estimation skills – comparing actual costs to estimated costs, using standardized processes and tools to consistently improve the accuracy and usefulness of project estimates, and stressing the importance of quality project estimating processes to creating effective business cases, and
 - IT Project Management skillsets that are oriented toward the standardization of project life-cycles and project portfolios.
- And, generally, CIO feedback indicated that the Tactical Plan might serve agencies best by:
 - Focusing on more concrete and simple deliverables – without proposing or requiring additional work to be implemented or delivered at the agency level (OPRD)
 - Focusing on smaller scale (i.e., less expensive), quicker-to-implement initiatives (OPRD)
 - Developing products, policies, procedures, guidelines that effectively extend the agencies current staff capability by having EISPD do the development on behalf of the agencies – thus providing the greatest value to agencies (OPRD)
 - Considering and projecting the impact to agencies of increased workload and expense by way of project costs and cost-distribution scenarios (ODVA)
 - Addressing the need to justify enterprise action to stakeholders and business unit managers who have other priorities
 - Demonstrating how Tactical Plan initiatives provide direct value to the constituents agencies they serve (ODVA)
 - Considering whether industry theories and "best practice" apply to the State of Oregon and serve the needs of Oregonians (DCBS)

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II. Ongoing considerations

A. Issues to be actively tracked through Tactical Plan versions/actions over time

1. IT Governance – Validate key (enterprise / governance) assumptions before moving forward with revising State IT Governance Policy (DCBS)
2. Enterprise Architecture – Continue to increase CIO and ABSD understanding of enterprise architecture practices and objectives (DCBS)
3. Systems Integration and Data Sharing – Establish as a priority and tie directly to the Enterprise Architecture Objective (OJD)
4. Shared Services – Support business functions that should be common to all agencies (specifically, human resources policy and activities – like FMLA/OFLA, performance management, and recruitment/retention – and fiscal accounting) (DEQ)

B. Other opportunities to refine TacPlan initiatives

1. Objective 1.1: IT Staffing
 - a) Add - Deliverables in recruitment and retention areas (DCBS)
 - b) Refine - Target the training that is needed / Timeliness of training
 - (1) More emphasis on training needed for current staff assignments or for planned succession (DCBS)
2. Objective 1.3: Enterprise Architecture
 - a) Do a full inventory
 - (1) So we can see who has what and what we can leverage (OJD)
 - b) Must be able to show a line-of-sight return-on-investment for enterprise architecture practices (DCBS)
3. Objective 3.5: Security
 - a) Make TIM/TAM an enterprise standard (OJD)
 - (1) Must meet agencies demands and timelines (Forestry)
4. Objective 2.1: GIS
 - a) More emphasis on how to get information from jurisdictions (efficiently / timely) to meet the needs of agencies (DCBS)
5. Objective 2.2: Enterprise Records Management
 - a) Develop Community of Interest to leverage knowledge and work (DCBS)
6. Objective 3.2: E-Government
 - a) Make Websphere the single architecture for the E-Government portal (OJD)
 - (1) Make Websphere the standard for citizen-based portals
 - (2) Use the Websphere content tools included in our existing licenses
 - (a) Do not look at another tool that requires additional purchasing and licensing
 - (b) Adding another tool adds complexity and unnecessary cost
 - b) Enterprise solution for Web Conferencing (Forestry)
 - (a) In particular, tackle the issue of complexity of licensing

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C. Other issues mentioned...

1. Conflicts in Input received from members

- a) Inventories related to IT initiatives (some counted this as essential while some thought it was not needed nor warranted)
- b) Project Management (some indicated a need for standardization, while others thought it was not needed or warranted)

2. IT Staffing

- a) Enterprise Learning Management System alone is not sufficient in meeting this strategic objective (Obj. 1.1). Additional deliverables in the recruitment and retention areas are needed. (DCBS)
- b) Rotation mechanism may not be what is needed - Staff are already fully consumed for years to come. Suggest we test the idea before we fully implement. (DCBS)

3. IT Governance

- a) Mistake to use one tool to inventory all projects / portfolios, or require using the same project methods (DCBS)