Enterprise Planning Portfolio

Decision Lens Training
Prioritize Initiatives via the Ratings Process

Strategy and Investment Management (SIM)
Office of Information Technology
Training Agenda

- Introduction
- Enterprise Planning Process (EPP) Overview
- EPP Prioritization Criteria
- EPP Ratings Process
Enterprise Planning Portfolio (EPP)

- The Strategy and Investment Management Division within the Office of Information Technology (OIT) facilitates the EPP process
- The State of Ohio EPP contains 30 separate agency portfolios
- Information submitted by the agencies is used to support statewide strategic alignment
EPP Process Overview

• Collect agency initiatives at the beginning of every Fiscal Year and Quarterly Portfolio updates
• Perform analysis to identify opportunities for shared services, agency collaboration, standardization & volume purchases
• Integration with Agency, DAS & OBM Governance processes
Benefits and Expected Outcomes

• **Set Direction.** Strengthen the alignment between Business, IT, and Financial Offices for the State and Agencies
  ➢ Support effective budget discussions between CFO and OBM Director using sensitivity analysis, scenario planning, and VROI

• **Informed Decisions.** Empower executive leadership to make informed decisions using stakeholder inputs
  ➢ Transparency of statewide initiatives across the Offices including Governors Cabinet, Innovate Ohio, and State CIO
Benefits and Expected Outcomes

• **Collaboration.** Identify and facilitate State and Agency initiatives
  ➢ Working together on common trends and opportunities will save the state time and money

• **Strategic.** Decisions are used to drive tactical planning and project management activities
  ➢ Bridging strategy and operational activities to effectively allocate available resources
EPP Prioritization Criteria

• Decision Lens is the technology enabler for the State of Ohio EPP process
• Technology Board engaged to:
  ➢ review and update criteria to reflect the Administration priorities
  ➢ establish priority weights through pairwise exercise
• State agencies will apply weighted criteria to prioritize portfolio initiatives
State of Ohio Criteria Weights

- Business Importance to the State
  - State Impact: 16.18%
  - Agency Impact: 14.48%
  - Reduce Complexity / Increase Efficiency: 13.9%

- Enterprise Strategy and Alignment
  - Alignment with Administration Goals: 24.91%
  - Alignment with Enterprise Technology: 13.58%
  - Data Intelligence: 6.3%

- Feasibility/Risk
  - Organizational Readiness: 5.02%
  - Legal/Political Considerations: 8.2%
  - Impact of Not Doing: 5.78%
  - Impact of Doing: 3.46%
  - Proposal Maturity: 2.31%
  - Simplicity: 4.37%

- Financial
  - Reduces Costs: 3.28%
  - Revenue Generation: 8.89%
  - Leverages Federal/Grant Funding: 5.52%
Prioritize Initiatives via the Ratings Process
Agency Pre-Requisites

- Align Agency Governance with the EPP Ratings process
- Determine Agency participants in EPP Ratings Process
Ratings Process Options

• **At Your Convenience (AYC):** Voters rate assigned initiatives on their own time. Overall results can be viewed at a later time and be accompanied by a group discussion.

• **Group Facilitation:** Voters meet to rate initiatives as a group to collaborate and encourage discussion. The Agency decides if everyone rates independently or if a “single vote” is used on behalf of the group.
Log In to Decision Lens

• Use your state email and password that you setup: https://ohocio-dl3.decisionlens.com

• Email Strategy and Investment Team if you have problems: DAS.State.ITPlanning.Manager@das.ohio.gov
Ratings Process

- **Access the Ratings screen:** After the voter(s) logs in and the ratings window has been opened, locate the task at the top of the page titled “Rate Alternatives…”. This will take the voter to the Ratings Overview page.

Click The ratings task near the top of the main lobby area
Ratings Process

- **Ratings Overview:** In the Ratings Overview page, read the instructions and close any pop-up tips. Click the orange “Start Ratings Alternatives” button.
Ratings Process

- **Rate Initiatives:** The first initiative is listed at the top of the page. Rate the initiative against the criterion using the scales provided. Click "Next" to move to the next criterion. Repeat this step for all initiative-criterion combinations.

Rate the initiative as to how it fares against the criterion shown below it.

Click “Next” to move to the next ratings screen.
Ratings Process

- To move through the process more efficiently, use the "multi-select" feature to list all initiatives or all criteria on the screen at the same time.

Use the “multi-select” features to display more ratings data on your screen.
Ratings Results

- Voters can view their individual results at the completion of their ratings.
- Agency Portfolio Owner can view consolidated ratings and facilitate follow-up discussions.
Thank You from
The Strategy and Investment Management Team