

# Enterprise Planning Portfolio (EPP) Decision Making Framework

**Purpose:** These guidelines are formulated to enable agencies to determine whether an Initiative / Idea / Investment belongs in the portfolio. If one or more of the following conditions are true, please include in your agency portfolio.

	Executive, Legislative or Federal Mandate	Agency Impact / Constituent Facing	Financial / Investment Value	Enterprise Service	Multi-Agency, Multi-Participant	IT Strategic Priority	Agency Specific Investments
Initiative Attributes	<p><b>Project/Initiative prioritized or sponsored by (any of):</b></p> <ul style="list-style-type: none"> <li>▪ The Office of the Governor</li> <li>▪ The Director of DAS</li> <li>▪ The Director of OBM</li> <li>▪ Ohio Revised Code</li> </ul> <p><b>as a State strategic priority</b></p>	<p>Initiative directly impacts public including (any one of):</p> <ul style="list-style-type: none"> <li>▪ high risk / vulnerable populations</li> <li>▪ public health, safety or security</li> <li>▪ revenue collection or expense / assistance disbursement</li> <li>▪ Enhances / re-engineers a mission critical process or application that serves citizens, businesses or workforce</li> </ul>	<p>Initiative meets any of the following:</p> <ul style="list-style-type: none"> <li>▪ Estimated total spend over lifespan of project is in excess of \$5M</li> <li>▪ Contracted total spend over lifespan of project is in excess of \$5M</li> <li>▪ Actual total spend over lifespan of project, inclusive of all contracted amendments or change orders is in excess of \$5M</li> </ul> <p>Total Spend is defined as all hardware, software, professional services and staff augmentation as to realize the project (e.g., "total cost")</p>	<p>Initiative is consuming an enterprise offering or service which is available to all Ohio Agencies, boards and commissions including (any of):</p> <ul style="list-style-type: none"> <li>▪ IT Optimization</li> <li>▪ Enterprise Shared Services</li> <li>▪ Enterprise Applications</li> <li>▪ OAKS Functional Footprint</li> <li>▪ Enterprise Service Catalog</li> </ul>	<p>Initiative effects or impacts other:</p> <ul style="list-style-type: none"> <li>▪ Agencies</li> <li>▪ Boards</li> <li>▪ Commissions</li> <li>▪ County</li> <li>▪ City</li> <li>▪ Federal</li> </ul> <p>or requires the active involvement and participation of any of these entities to be successful.</p>	<p>Initiative includes any State Strategic IT Priority as established by the State Leadership:</p> <ul style="list-style-type: none"> <li>▪ Security</li> <li>▪ CloudSmart</li> <li>▪ Data Analytics</li> <li>▪ Digital Experience</li> <li>▪ Identity Management</li> <li>▪ Digital Services</li> <li>▪ Process Automation</li> <li>▪ AI/Machine Learning</li> <li>▪ Mobile</li> </ul>	<p>Initiatives that are platform upgrades, application enhancements, research and prototypes that may not belong to any of the previous categories can also be included in your portfolio</p>
Action	Include in Portfolio Select "Agency" factor	Include in Portfolio Select "Agency" factor	Include in Portfolio Select "Agency" factor	Include in Portfolio Select "Enterprise" factor	Include in Portfolio Select "Agency Collaboration" factor	Include in Portfolio Select "Agency" factor	Include in Portfolio Select "Agency" factor