Enterprise Planning Portfolio (EPP)
Innovation Committee
Final Recommendation
07/29/2021
Charter Work Products

- Future State EPP process
- Evolved criteria, portfolio structure, reporting elements and format
- Tactical recommendations on how agencies can employ EPP to strengthen Business-IT engagement
- Relevant updates to IT-02 Strategic Investment Policy to reflect future state process
- EPP Platform next release roll out plan
Working Group Methodology

- McKinsey recommendations and Workshop materials
- Pain points with EPP process
- Agency processes and requirements
- Context of State of Ohio’s Governance structure (TAC, TAG)¹
- EPP Platform next release features
- Committee discussion and consensus

All the above were employed, with an emphasized focus on improving agency experience, transparency and collaboration to formulate the EPP IC recommendations.

¹ TAC – Technology Advisory Committee, TAG – Technology Advisory Group
Final EPP IC Recommendation

Agency Experience
1. Improve EPP structure (data) and embrace agile refresh
2. Simplify EPP prioritization criteria and ratings process

Transparency
3. Process Improvements to enhance transparency in sharing information

Collaboration
4. Establish communication channels with the TAG, Innovation Committees / Working Groups, ePMO
5. Recommend best practices for Agency Business-IT engagement
Final EPP IC Recommendation

Agency Experience

Recommendation 1: Improve EPP model (structure) and embrace agile refresh

Portfolio Model
• Add new data field to capture ‘Primary/Secondary’ Technology of the investment
• Rename enterprise/agency? data field → shared services?

Portfolio Content
• Update portfolio during idea stage as the vision develops, since EPP is a long-term planning tool (e.g., Technology Proof of Concept, Prototype)
• Planning must occur prior to Procurement to negate “Checking the Box” scenario

Portfolio Update Cadence – Agile²
• Consistent refresh to DAS portfolio as shared services and products evolve
• Refresh agency portfolios at a minimum once a quarter. This is recommended by the IT-02 Strategic Investment Planning policy

² Recommended by McKinsey
Final EPP IC Recommendation

Agency Experience

Recommendation 2: Simplify EPP prioritization criteria and ratings process

- Flatten parent/child structure, reducing total criteria count from 14 to 4
  - Agency Impact
  - Enterprise Strategy and Alignment
  - Feasibility and Risk
  - Financial Benefits

- Improve user experience in rating process through a 5-star rating system
- Agency specific prioritization will correlate to Agency Impact criteria
- Add “Agency Ranking” data field to indicate agency priorities (1…N)
Final EPP IC Recommendation

Transparency

Recommendation 3: Process Improvements to enhance transparency in sharing information

OIT Service Roadmap

• The Office of Information Technology (OIT) would have defined accountability to agencies to publish an enterprise product roadmap

EPP Access

• Provide access to the roll-up portfolio, a consolidated model of all agency portfolios, to all agency EPP Point of Contacts
• This feature is available in the new version of EPP Platform (Decision Lens Accelerate)

EPP Content

• Follow Decision Tree framework to determine what goes into EPP
• Agencies are encouraged to add agency specific investments, in addition, to enterprise focused investments

2 Recommended by McKinsey
Final EPP IC Recommendation

**Collaboration**

**Recommendation 4: Establish communication channels with the TAG, Innovation Committees / Working Groups and ePMO**

**Communication with Technology Advisory Group (TAG)**
- Provide agency portfolio reports to all TAGs for agency collaboration and insight on a quarterly basis
- Provide technology specific reports to TAG for their review and feedback (Cloud, Security, Analytics, Digital Services, Identity Management)

**Innovation Committees / Working Groups**
- Governance of working groups would evolve to define clear role and responsibilities
- EPP would be tightly aligned to strategic planning process, increasing importance of acting on working group outcomes
- The TAG leader role could expand to provide implementation support

**Enterprise Project Management Office (ePMO)**
- PSC could develop into an ePMO, expanding strategic project management capabilities

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2 Recommended by McKinsey
Final EPP IC Recommendation

Collaboration

**Recommendation 5: Recommend best practices for Agency Business-IT engagement**

What is the value-add potential of EPP? To create a shared value for all State agencies

- Agencies can use EPP as a common ground to seek input from business divisions. Technology enablement through Decision Lens, similar to Google Docs like interface, for simultaneous portfolio edits from stakeholders
- To collaborate with internal stakeholders on agency priorities (i.e., Program areas, IT, Finance, Legal)
- To identify opportunities for collaboration with other State agencies
- To communicate and share information with Governing agencies - OBM, DAS
  - Provides OIT Service Providers useful information in resource planning
EPP IC – Next Steps

- Tina Chubb (INS) and Vanitha Zacharias (DAS) will review the committee recommendations with the TAC
- After TAC approval, the committee recommendations will be shared with the MAC
- SIM team will perform following activities:
  - Share the recommendations with all agency EPP point of contacts
  - Update charter work products based on committee recommendations
  - Work with Decision Lens to implement committee recommendations
  - Work with Decision Lens to migrate selected agency portfolios (DAS, INS, MCD, TAX, EPA) to Decision Lens Accelerate
- EPP IC will reconvene, approximately 4 weeks later from now, to review the migrated portfolios and validate the structure, prioritization criteria and other changes.
- After the committee approval, the remaining portfolios will be migrated.
- Both committee members and other agencies will be kept informed of the migration activities, process changes etc. via regular communication (email, 1:1 basis, training materials)