



**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)<sup>1</sup>
- 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.

<sup>1</sup> 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 – Agile<sup>2</sup>**

- 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

<sup>2</sup> 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<sup>2</sup>**

- 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

# 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) <sup>2</sup>**

- 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 <sup>2</sup>**

- 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) <sup>2</sup>**

- PSC could develop into an ePMO, expanding strategic project management capabilities



# 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)