



Information Technology (IT) Strategic Plan 2024-27

Progress Report:
May 2025

Information Technology (IT) Strategic Plan: Progress Report May 2025

I - Executive Summary

Of the seven (7) Strategic Technology Opportunities (initiatives) identified with the 2023 version of the Oregon Commission for the Blind's (OCB) IT Strategic Plan, three were presented to Oregon State's CFO and her staff of analysts during preliminary policy option package conversations for agency request budget (ARB) 2025-27. Due to concern over the availability of General Funds, and the uncertainty with Federal Funding and the overall economy since the change in administration in Washington, D.C., those initiatives were not selected for funding. Four other initiatives, out of the seven total, were funded through savings found elsewhere in the 2023-25 budget and were worked on throughout 2024 and the first several months of 2025. Those initiatives included movement of most of our legacy network share data to OneDrive/Teams/Sharepoint, the adoption of Remote Incident Manager (RIM) as an accessible remote access tool for internal as well as external use, updating our publicly facing website to abide by new standards, and 10 customizations to our AWARE case-management system.

While not funded, OCB also dipped our toes into AI by researching a customized solution intended specifically for State Vocational Rehabilitation agencies. With the State's expectations around AI in mind, we have shifted our focus from a third-party vendor's product and begun contemplating how Microsoft Copilot can enable the view into our cloud data lake, as we've simultaneously begun migrating agency data to the 365 cloud.

One new initiative was identified as the refresh of the plan was in process, bringing our total initiatives up to eight (8). The new initiative, guided by the cloud-smart approach principle, would consist of a tool to assist the Orientation and Career Center (OCCB) with student enrollment and scheduling. This new application would replace an out-of-date legacy Microsoft Access database which has aged beyond its usefulness.

The principles which guide Information Technology (IT) needs at OCB continue from the 2023 version of OCB's IT Strategic Plan and are as follows:

- *User Focused – Ease of Use*
- *Quality Business Data*
- *Cross-Agency Collaboration*
- *Advancing Diversity Equity Inclusion and Accessibility*
- *Mission First*
- *Cloud-Smart Approach*

OCB's Business Objectives also remain unchanged from 2023, with *Operational Excellence, Successful Client Outcomes, Effective Education and Outreach*, and an *Engaged & Proficient Team* the business goals we seek to address.

II - Strategic Objectives / Initiatives

1. Operational Excellence – In addition to the new initiative, the OCCB scheduling tool, we continue our pursuit of operational excellence with our move to migrate local network share data to cloud data storage in OneDrive/Teams/Sharepoint. This will narrow down data sources to a single source of truth while completely re-assigning access rights based on the principle of least privilege that comes from data being found in Teams based on department, initiative, or project. This project will also future-proof our data against issues like hardware and software warranties, as updates to the underlying systems hosting the data are accomplished in the cloud by Microsoft and not local human resources. This migration is nearly

complete, with weekly updates from our project manager and continued progress toward our goal of making our network shared data a legacy system slated for eventual retirement.

2. Successful Client Outcomes - The goal of successful client outcomes is tied to four initiatives in our IT Strategic Plan.
 - a. First among them are our ongoing AWARE case-management improvement projects being worked on by our vendor Alliance in coordination with local IT and vocational rehabilitation resources. These AWARE system upgrades encompass two project phases, one which was funded from existing 2023-25 resources and one which, if pursued, will have to be funded from savings identified elsewhere in the 2025-27 legislatively adopted budget. Both phases seek to have customers rate their satisfaction with the agency's customer service as "good" or "excellent." These goals are tied to ongoing system development from Alliance with regular feedback from OCB personnel. Ten customizations were completed since the original plan, with ongoing improvements rolling out from our vendor and regular check ins with stakeholders.
 - b. The third initiative, supporting the goal of successful client outcomes is the Matrixed OCB 2025. This initiative seeks to develop agency-level expertise with mandated statewide cloud-based applications including Workday Human Resources, Payroll and Time-Tracking, OregonBuys, and whatever fiscal option is contemplated in the future for SFMA by DAS and EIS. This initiative is in process, but with challenges presented by limited human resources and personnel churn, the focus has shifted from a permanent position dedicated to these applications to a limited duration project management position focused on helping OCB prepare for Order of Selection (OOS). OOS in the context of a state vocational rehabilitation program is a process for prioritizing which eligible individuals receive services when resources are limited, ensuring that those with the most significant disabilities are served first.

- c. The fourth initiative, RIM Tool Adoption, sought to deploy a workplace standard remote assistance tool that could be used by OCB personnel supporting clients, as well as by IT personnel supporting their OCB colleagues. This tool is accessible by screen readers, so would be usable by all OCB personnel, no matter their vision status. This initiative is effectively finished, and the tool is in use by the agency after some unanticipated delays.
3. Effective Education and Outreach - The initiative supporting this goal is tied to the re-design and re-deployment of our Commission for the Blind website using the latest state-standard SharePoint templates. This initiative has been successful, with the project manager having moved on to the data migration project after finishing the refresh of our website.
4. Engaged and Proficient Team - This goal was tied to the initiative of adopting a chatbot-enabled knowledge base for OCB personnel, so their questions around regulations, requirements, processes, and procedures can be easily submitted to an AI logical-language-model and that model can return the best and most pertinent information based on the data in our 365-hosted data set. Abandoning the initial thought to acquire a customized solution intended specifically for State Vocational Rehabilitation agencies due to the cost of the same, this initiative's success now relies on the data migration project's success and the licensing/adoption of Microsoft Copilot as our AI solution.

III - Metrics and Targets

Initiative	2023 Magnitude of Costs	Actual (or revised) for 2025	Targeted Start Date	Duration (Months)	Actual Duration (Months)	Complete
Local to Cloud File Shares	\$28,226	\$153,146	12/1/2023	12	12 **	No **
AWARE Project Phase 3	\$252,000	\$237,248	10/13/2023	21	21	Yes
AWARE Project Phase 4	\$397,440	\$90,400	7/1/2025	24	n/a	No
Matrixed OCB 2025	\$178,109	\$287,990	7/1/2025	24	n/a	No
RIM Tool Adoption	\$31,000	\$31,000	1/1/2024	6	12	Yes
Website Redesign	\$67,753	\$38,369	1/1/2024	6	6	Yes
Chatbot Knowledge Base	\$466,680	\$54,000	1/1/2024	42	n/a	No
OCCB Student Services	n/a	*\$11,520	* 7/1/2025	* 6	n/a	n/a

**NEW! Initiative added to the 2025 version of OCB's IT Strategic Plan.*

*** Actual start date shifted to 7/1/2024 and while not yet complete, as of the date of this report, initiative will be complete by 6/30/2025.*

IV - Resource Allocation

No additional funding for OCB's IT Strategic Plan became available in 2023-25, nor will any become available for 2025-27, the new budget biennium which begins July 1, 2025. With this constraint being the most significant, OCB still managed for free-up \$306,617 in their 2023-25 budget to operationalize 10 customizations to the AWARE case management system, adopt the RIM too, and migrate their old website to the state's refreshed template. Estimated to cost \$350,753 initially,

these three initiatives were completed early or timely and under original estimated costs by the amount of \$44,136.

With similar, if not even more significant, funding constraints in place for the 2025-27 biennium OCB has scaled back their plan to adopt an AI Knowledge Base specifically customized for State Vocational Rehabilitation agencies to the more modest thought to acquire CoPilot Premium licenses for all employees on OCB's roster.

Two initiatives which are in process, or need to commence shortly, will cost more than originally anticipated as the projects have evolved. The first, local to cloud file shares, required a dedicated operations and policy analyst with project management experience and exemplary communication skills to lead the community through the change.

The second initiative has evolved from adding additional headcount to develop agency-level expertise with mandated statewide cloud-based applications, to bringing on board a limited duration architect and project manager to facilitate the process of Order of Selection (OOS). In the context of a state vocational rehabilitation program, OOS is a process for prioritizing which eligible individuals receive services when resources are limited. It ensures that those with the most significant disabilities are served first. OOS requires that both fiscal and personnel resources be assessed, and agency circumstances analyzed. Also required is consultation with the State Rehabilitation Council which must occur prior to implementation of OOS, review of tracking system capacity (or build out of a tracking system), the State Unified or Combined Plan must be amended, public hearings held, staff trained on OOS policies and procedures, and approval obtained from the Rehabilitation Services Administration.

V - Risks and Mitigation Strategies

Available funding represents the greatest risk to the Commission for the Blind's IT Strategic Plan. As with any community which has been asked to adapt to regulatory changes, at both the national and state level, in a rapidly evolving IT environment and uncertain economic one, burnout, change fatigue, and turnover amongst personnel also represent risks for OCB.

To combat these, OCB continuously revisits its strategies in the effort to help employees and managers build resilience and prioritize changes. By encouraging a culture of change acceptance, providing ongoing support, and engaging employees in the process by fostering open communication, OCB attempts to manage the pace of change, create a positive work environment, and gather feedback to mitigate the negative impacts of change fatigue.

VI - Next Steps

With the IT Strategic Plan dependent on available funding, agency leadership will continue to advocate for the resources the agency needs to support the employees who support the blind Oregonians we serve in the weeks, months and years ahead.

VII – Conclusion

Oregon Commission for the Blind's IT Strategic Plan updated for 2025 highlights the attempt to balance strategic ambition and fiscal / resource constraints, the pivot toward cloud-based and AI-enabled solutions, and the proactive steps OCB is attempting to mitigate risks while maintaining operational excellence.