ENTERPRISE TECHNOLOGY SERVICES STRATEGIC PLAN – 2015 Update

ETS Roadmap for 2012 – 2016

Tony Black, Administrator (Interim)

503-373-1000
ETS.info@state.or.us
http://oregon.gov/das/ets

DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES

Enterprise Technology Services Strategic Plan – 2015 Update

ETS Roadmap for 2012–2016

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Revision History

Revision Number	Date	Comment
1.0	2/3/2012	Initial publication
1.1	8/15/2013	Add new tactics (1.13, 1.14, 2.4, 2.5, 4.13, 4.14, and 5.6) and update status for all tactics.
1.2	5/19/2014	Updated status for all tactics
1.3	7/22/2015	Add new tactics (6.9 and 6.10) and update status for all tactics. Replace appendix A.

Oregon
Kate Brown, Governor

Department of Administrative Services
Enterprise Technology Services – Administration Offices
530 Airport Road S.E.
Salem, OR 97301
PHONE: 503-378-2176
FAX: 503-378-2736

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Dear Colleagues,

As we enter the last year of our 2012-2016 Strategic Plan, we can look back and reflect on the mission, goals and strategies that drove our actions. There have been many accomplishments since the inception of this plan three years ago, and a tremendous amount of work is currently in progress that address identified goals. The content herein remains relevant and actionable. The principles by which we operate continue to provide guidance in terms of the work we do on behalf of our stakeholders, partners, governing bodies, and staff. In this message last year, the Administrator wrote,

"Throughout our organization's history some things have remained constant, including a firm commitment to our guiding principles in providing IT service choices that optimize and enable state government operations and services. These principles represent the foundation that has equipped ETS to adapt and change, consistently meeting the needs of our customers and stakeholders."

With the implementation of House Bill 3099, authority and accountability for the services delivered by ETS became the responsibility of the State CIO. The following are excerpts from a summary of the Bill.

"*… in early 2015, the Governor temporarily assigned operational responsibility for Enterprise Technology Services (ETS) to the State CIO. This reassignment and delegation of joint authority over statewide IT policy and operations was put in statute under HB 3099, which provided that the State CIO is an independent official, directly responsible to the Governor as the primary advisor on statewide IT policy and operations and telecommunications."*

"By clarifying the role of the State CIO and ensuring alignment between statewide IT policy and operations, HB 3099 provides an opportunity to reimagine how we deliver IT services across the enterprise and support the business needs of state government."

As a result of HB 3099 and as a matter of continuous improvement, this Strategic Plan update includes two new tactics. The first is ***Organizational Alignment with the State CIO***. This tactic calls for developing and implementing plans to merge ETS into the Office of the State CIO. The second is ***Workforce Management***. This tactic calls for developing a strategy and plan to implement clear structures around workforce management, workforce development, and position management.

There has also been significant progress in addressing existing goals and strategies. An example in relation to the expansion of statewide IT services is a ***New Disaster Recovery Service***. One of the technologies implemented as part of the *Sustainability/Lifecycle Replacement Project* is the Unified Computing Platform (UCP). This highly-efficient computing technology is currently being provisioned for disaster recovery in our Montana partner's data center facility for rapid recovery of our third computing platform in this environment.

Regarding the *Sustainability/Lifecycle Replacement Project*, projects in this program are either complete or are in the execution phase. Remaining work is scheduled for completion by this time next year, representing a significant leap forward in terms of the functionality, performance and reliability of the infrastructure managed by ETS.

Other initiatives with significant activity include ***Organizational Change Management***, ***Information Technology Service Management (ITSM)***, ***Statewide Voice Over IP (VOIP)***, and ***Strategic Sourcing***.

Looking back, we can be proud of our accomplishments in light of the all of the changes and uncertainty. Looking forward, we recognize a future filled with change as we continue to replace antiquated equipment with modern technologies, align with the Office of the State CIO, restructure the organization, and regain focus on our core mission. It is an exciting time to be at ETS.

Tony Black, Administrator (Interim)
Enterprise Technology Services

Executive Summary

Description of the Service

Enterprise Technology Services (ETS) is a new state service division that prides itself on being the best value technology provider for Oregon's government business entities.

ETS focuses on finding ways technology can enhance the state's business model to create opportunities for government. Technological advancements can allow state business to serve customers in new ways, support growing service demands, increase trust in state government via value-added government services, and improve access to information to create new state services opportunities.

Building on the Foundation

The State Data Center (SDC) was the original service operation. It was created in 2006 by agency directors and CIOs to leverage computing and network infrastructure technology across the state using a utility service model. The initial services provided to a large distribution of customers and jurisdictions were computing and communications. For example, computing services were provided primarily to the 11 largest executive branch agencies. Communications services were provided or brokered for most state agencies as well as counties, municipalities, schools and tribes.

Request and Opportunities to Expand the Services

After building a successful business model for delivery of statewide IT services, the SDC was routinely asked to grow its service offerings. These requests were to add new state services, to increase services to meet technology capacity demand, and to allow other government customers to buy from the existing scope of services. These requests indicated a confidence in the service model to provide benefits and savings to both the buying customer as well as the state.

Service Portfolio

ETS is the leading supplier and expert in managed computing technology for Oregon state government. Our infrastructure is certified as offering the highest availability in Oregon for mainframe, storage, and server-based applications. Our network and voice services provide secure and reliable connection to the people, computers and data necessary to conduct business in or with the state. New services, such as providing new or replacing legacy Enterprise Applications are being added to the service portfolio. These services offer flexibility and choice aimed at meeting the varying needs and sizes of our government customers. All services use best practice standards, meet federal and state requirements, and are maintained and monitored to ensure that the technology supporting the government's business is secure and reliable.

Value to State Government

Oregon citizens, businesses and local governments deserve to and significantly benefit when they conduct business with the state through modern, safe, and reliable technology. This is accomplished by continually leveraging the state's IT investment and resources. The ETS technical experts form partnerships with customers and vendors to choose and implement the best value IT solutions for all stakeholders. This approach allows all stakeholders from individual citizens to large agencies to benefit from the same technology solutions as Fortune 500 companies while driving unit costs down.

Technology as an Investment, not an Expense

If state government is to meet the growing demand for services, executives must think of technology spending as an investment, not an expense. Technology investments should support the business both today and in the future. The right investments in technology will help the state save money, save time, do more with less and grow the capability of the state to meet an increased demand for services. The investments need to support where state business will be in five years and invest in technology accordingly.

Financially Stable and Competitive

A 2011 findings report from the Legislature indicated "The ROI on the state data center strongly supports the state's decision to build a single consolidated center." In addition, "the service costs and rates are within or far below industry standards." The SDC is financially stable and competitive. Indicators of the SDC's financial stability and competitiveness include:

- Regular review of SDC finances by financial experts in the customer agencies, federal partners and Secretary of State (SOS)
- A systematic plan for budgeting which follows a model for cost transparency and fully burdened rates for products and services
- Aggressive economizing to maintain a durable competitive advantage.

Our Mission

Our mission is simple—To provide reliable, agile, and flexible IT service choices while optimizing the state's IT investments.

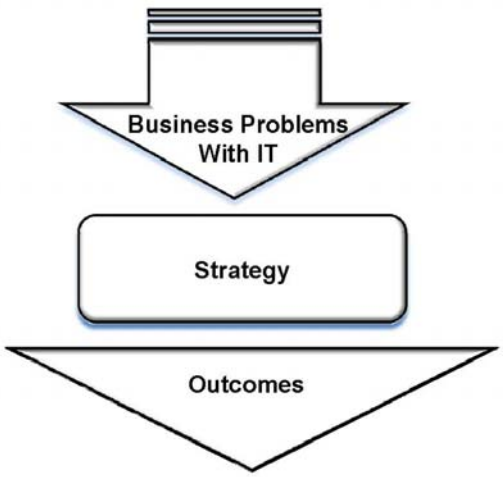
Plan Development

Choosing a Model Based on the Voice of the Customer

Out of a variety of strategic plan models we chose a model based on defining the root problems facing the business as articulated by the voice of the customer. We then used a structured approach, focusing on a few, pivotal goals whose accomplishment will lead to a cascade of favorable outcomes.

The approach does more than urge us forward toward a goal or vision. It honestly acknowledges the challenges our business faces and provides an approach that technologists can use to help overcome them.

Model Focuses Strategy on a Few, Pivotal Goals

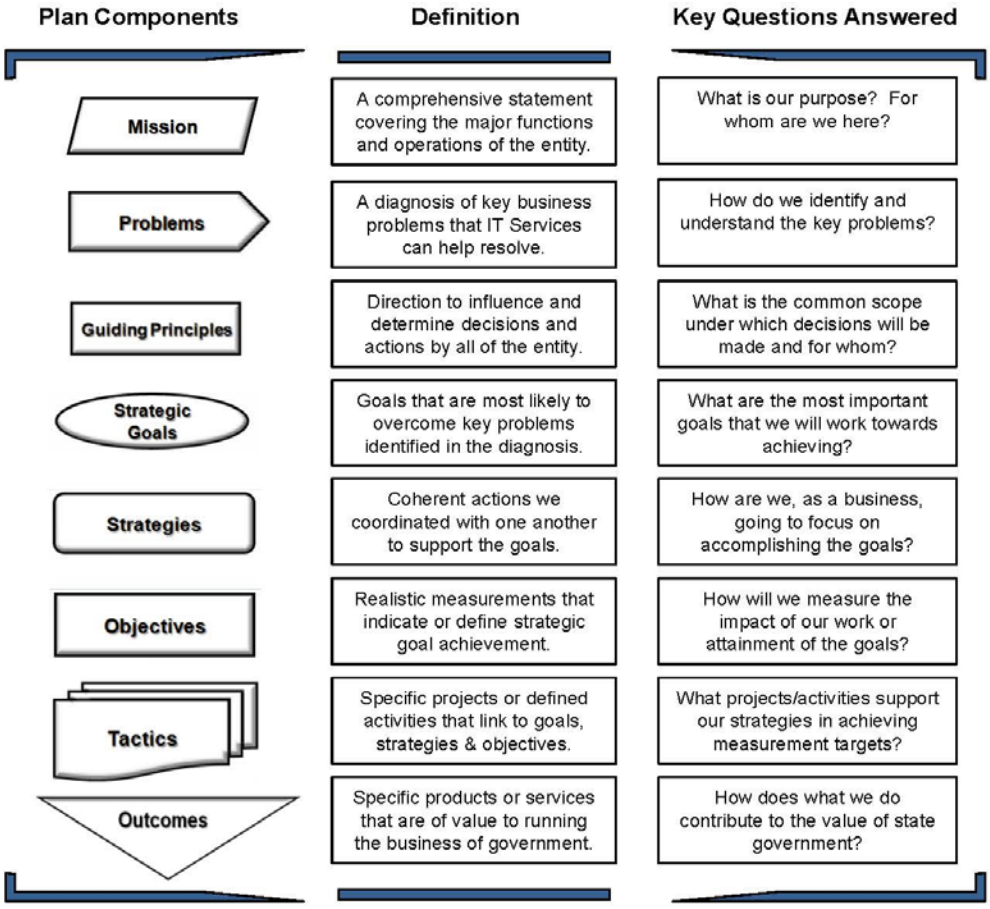


Our strategy is the bridge between the state's most critical business problems and the service outcomes with the highest impact.

The model emphasizes focusing solely on the crucial factors of the situation and designing a way to coordinate and focus actions to deal with them. It steers away from trying to accommodate a multitude of conflicting demands and interests, broad goals, ambitions, visions and values.

Planning Component Definitions

It is important to recognize and understand the various components of strategic planning. The following planning components are defined to illustrate relationships and the key question behind each one.



The mission, problems, and guiding principles provide scope to keep the strategic plan focused. The strategic plan detail lays out the goals, and each goal's strategies, objectives and anticipated tactics. The outcomes then are the impact that signals how IT enables the business to run state government.

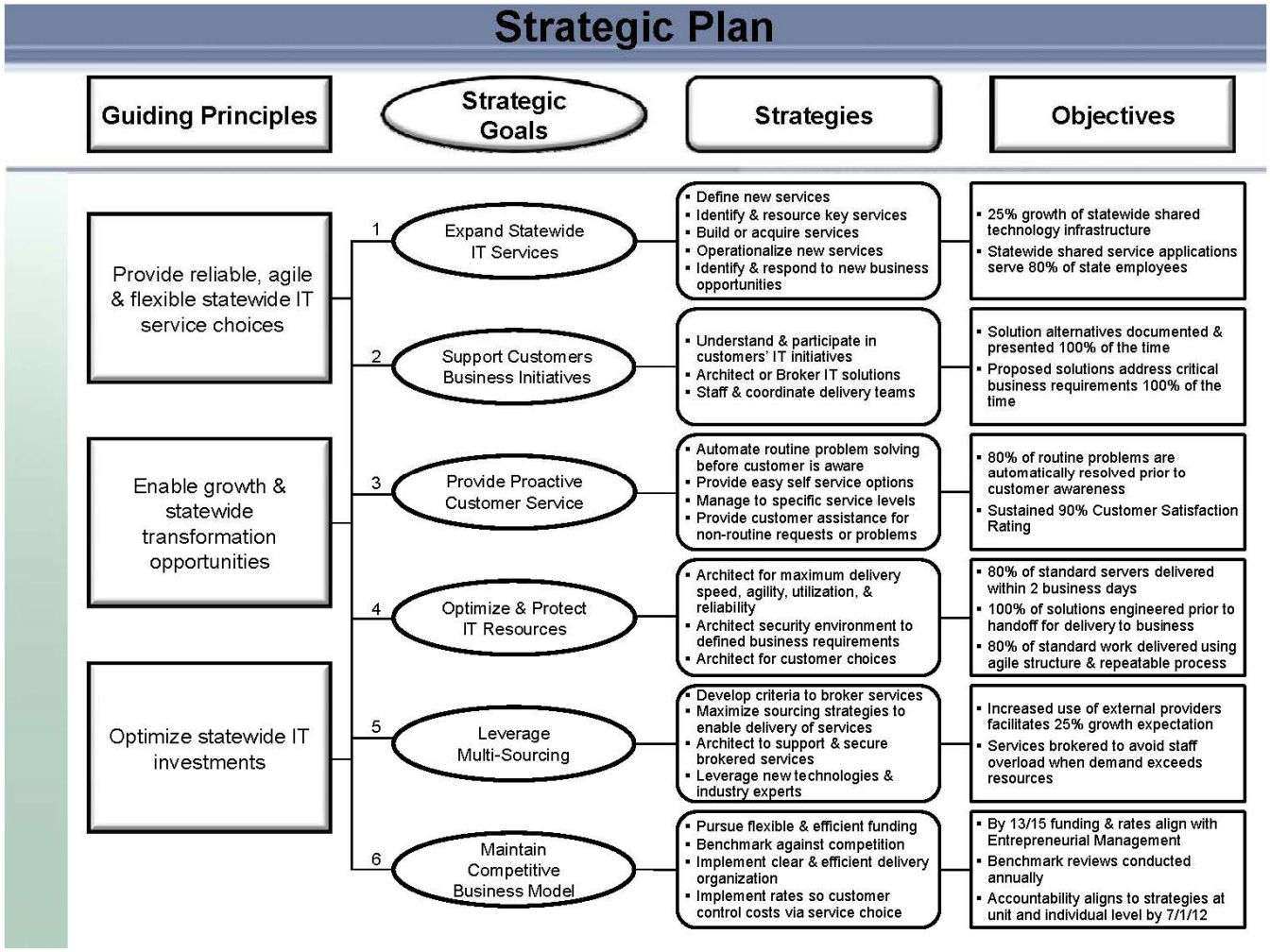
Guiding Planning and Managing Results

This strategic plan is guided by the voice of the customer and the Oregon Enterprise Information Management Strategy (EIRMS). We have mapped our strategic goals, as defined by customer problems, with the EIRMS in appendix A. The lifecycle of this plan includes an annual report on results, regular feedback from the customer and annual adjustments to ensure ETS is meeting business needs.

Many plans fail for a number of reasons, such as inadequate front-end planning or vague requirements linked to high expectations. Using a customer driven lifecycle to manage results improves business outcomes by working together to build a solid foundation.

Strategic Plan Summary

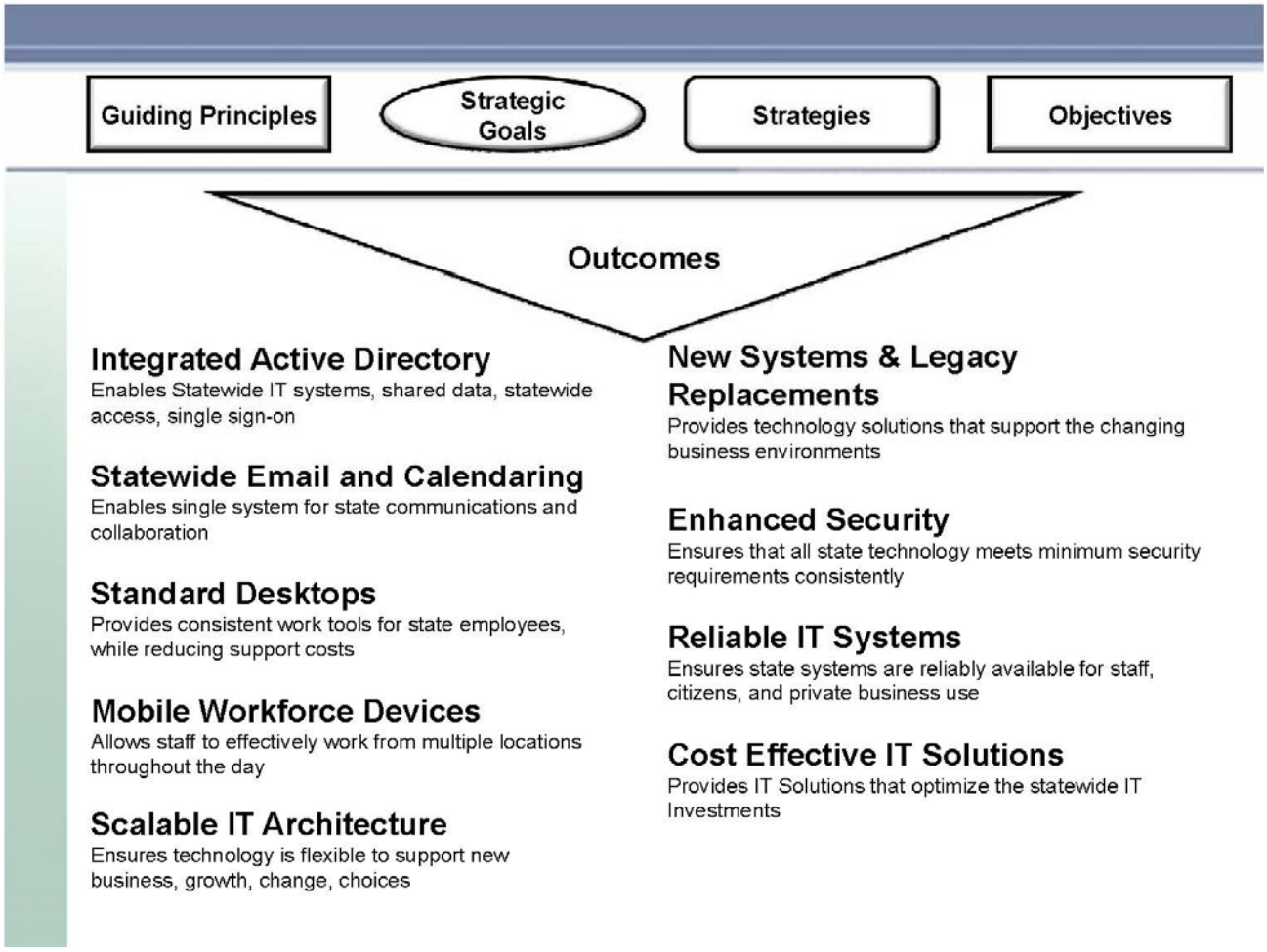
Strategy Snapshot The following is an illustration of the ETS strategic plan within the model framework. The intent is to provide a simple view of the plan and its relationships. The details of the plan are provided later within this document.



Strategic Plan Outcomes

Outcomes Snapshot

The following is an illustration of potential business outcomes that the strategic plan is set up to accomplish. The intent is to provide a simple view of the potential outcomes and show how the plan components lead to the outcomes. The details of the plan are provided later within this document.



Outcome Decisions

Each outcome will be delivered via a series of planned projects or tactical operations. Projects requiring additional resources will be recommended by our customer board. These recommendations indicate a desire for the new shared services or efficiencies and a willingness to prioritize and invest resources to achieve all or parts of the outcomes. These efforts may require additional funding limitation and resource approval by the Legislature.

Strategic Plan Details

Defining the Problem

In building a business strategy, if you fail to identify and analyze the root of the problems facing your business, you don't have a strategy. Instead, you have a stretch goal or a list of things you wish would happen.

To identify the problems facing our business, we chose to ask IT shops around the state and ourselves, "What are the most common complaints your business has about IT?" The intent was to gather a business view, accurate or not, as to what they think is wrong with IT.

Business View of Most IT Shops

Analyzing the Problem to Form the Guiding Principles

By getting a business view of what is wrong with IT, we were then able to analyze, decipher and group the various complaints to see common themes from across state government. From there we restated the complaints into a statement of what they would like IT to do for the state. This established a few strong guiding principles that will allow everyone to see how IT can enable the state in conducting state business.

Problems as Guiding Principles

Provide reliable, agile and flexible statewide IT service choices

1. IT has long backlogged request lists that will never get done.
2. Funding prevents staffing up/down quickly to meet business demands.
3. IT that is centralized creates one size fits all solutions and prices.
4. IT in the state ignores the newer mobile technologies, due to security or support issues.
5. IT organization structure hampers responsiveness (silos, centralized vs. decentralized, business more capable).
6. IT applications and infrastructure are unreliable creating more work for the business.
7. IT state purchasing processes, and the review of the design and contract language, is overly long and apparently subjective (easier or harder depending on whom is reviewing).
8. When IT has to buy something, the process, design, contract language lengthens the project, sometime for years.
9. IT doesn't effectively communicate its services to the business.
10. IT at the state is not agile.
11. IT solutions at the state support the lowest common denominator.
12. IT makes it impossible to get access to what I need to do business.
13. IT security in the state prevents flexibility, choice, responsiveness.

Enable growth and statewide transformation opportunities

1. IT is very slow to expand/decrease to meet business changes, growth, or decreased need.
2. Applications are antiquated and no longer meet many business needs.
3. IT cannot self-fund new solutions or ventures.
4. The state has a very poor record of successfully implementing medium- to large-scale IT projects.
5. The state is unlike any other business and IT applications purchased "out of the box" just don't work.
6. 96% of the states IT systems are legacy, almost all large and critical systems are older than 30 years.
7. IT spends so much time updating and modifying old applications, nothing is left to work on replacing applications.
8. IT in the state is hard to maintain.
9. IT resources can't keep up with the IT growth demands.
10. IT staff in the state rarely get modernization training due to cost.

Optimize statewide IT investment

1. IT costs a lot.
2. Inconsistent funding across agencies creating inconsistent IT service to the public.
3. IT lacks ability to "completely" divest of old technologies (IMS, etc.).
4. IT in the state is expensive to change.
5. IT has no succession plan for its aging workforce.
6. IT has an aging workforce and loss of expertise supporting legacy systems.
7. No enterprise project portfolio management.
8. The state has 57 email systems.
9. There are 1000s of different desktops that could be standardized.
10. I have to buy IT products or services from state contracts even though I can get better pricing elsewhere.
11. IT doesn't effectively communicate its changes or projects.
12. Meeting security requirements of feds, partners, public, etc. is way too expensive.
13. IT services/skills are replicated across many agencies creating inefficient use of FTE.

Guiding Principles

The three guiding principles for the 2012-2016 statewide IT services provide the common scope under which decisions will be made regarding strategies and outcomes.

GP1 – Provide reliable, agile and flexible statewide IT service choices

Information Technology must provide choices that help organizations respond quickly to new business imperatives, develop new business services and provide mechanisms to allow users to self-integrate services. IT service choices must enable numerous business operations within and across government by resolving integration-related problems and simplifying user-interfaces, connectivity and data exchange.

GP2 – Enable growth and statewide transformation opportunities

Enable future and legacy applications to mesh seamlessly using standards-based services versus building systems on a solution-by-solution basis. Enable the consolidation or replacement of numerous business processes supported by multiple systems in a simple user interface.

GP3 – Optimize statewide IT investments

Promote the reuse of new and existing assets to increase efficiency and reduce application development and support costs. Enable IT systems to quickly leverage standard solutions and services, providing alternatives for the state to obtain multiple returns on each dollar invested.

Setting the Goals

Strategic Goals were set by looking through the lens of our mission and the guiding principles. The following criteria was used for selecting these goals:

1. Avoid creating a scrambled mess of things to accomplish.
2. Keep the list of goals short—not a long list of things to do.
3. Focus on the most important things that support your mission and the guiding principles of state business.
4. Avoid a restatement of the state of affairs or the problems

Strategic Goals

The six strategic goals for 2012–2016 statewide IT services are:

Goal 1 – Expand Statewide IT Service

Achieve greater cost savings and mitigate rising costs by expanding our statewide IT service offerings and bringing in new customers. Expansion allows the state to realize further cost savings through efficiencies and volume discounts.

Goal 2 – Support Customer Business Initiatives

Ensure that IT services appropriately align with customer business needs. Providing technology choices aligned to business needs will enable informed technology investment decisions that add value to desired business outcomes.

Goal 3 – Provide Proactive Customer Service

Proactive customer service improves the overall customer service experience. Service interruptions will be detected and resolved prior to customer awareness. Simple mechanisms will enable customers to self-help or obtain assisted help. These practices will free technical resources to assist with more complex customer issues.

Goal 4 – Optimize and Protect IT Resources

Provide a well-designed and architected secure computing and communications environment to ensure optimal service delivery to business. Architecture and process will be optimized to support agile, reliable and secure computing and communication services.

Goal 5 – Leverage Multi-Sourcing

Multi-sourcing allows Enterprise Technology Services to meet efficiently the needs of customers by providing scalable solutions in a timely and cost effective manner. By multi-sourcing IT services we can improve service levels and enable access to specialized vendors and emerging technologies.

Goal 6 – Maintain Competitive Business Model

Maintain a competitive business model that ensures organizational efficiencies, competitive and flexible rate structure, continuous scanning of future opportunities and knowledge of client business needs.

Each goal's strategies, objectives, metrics and tactics are described in the next section.

Strategic Goals

Goal 1 – Expand Statewide IT Service

Achieve greater cost savings and mitigate rising costs by expanding our statewide IT service offerings and bringing in new customers. Expansion allows the state to realize further cost savings through efficiencies and volume discounts.

Goal Alignment

This primary goal supports the guiding principle:

- **Optimize statewide IT investments**

This goal contributes to the guiding principles:

- **Provide reliable, agile and flexible statewide service choices**
- **Enable growth and statewide transformation opportunities**

Outcome Alignment

This goal supports the following outcomes:

- **Statewide Email and Calendaring** – Enables single system for state communications and collaboration
- **Standard Desktops –** Provides consistent work tools for state employees, while reducing support costs
- **Mobile Workforce Devices –** Allows staff to effectively work from multiple locations throughout the day
- **New Systems and Legacy Replacements –** Provides technology solutions that support the changing business environments

Key Strategies

- Define new services
- Identify and resource key services
- Build or acquire services
- Operationalize new services
- Identify and respond to new business opportunities

End State Objectives

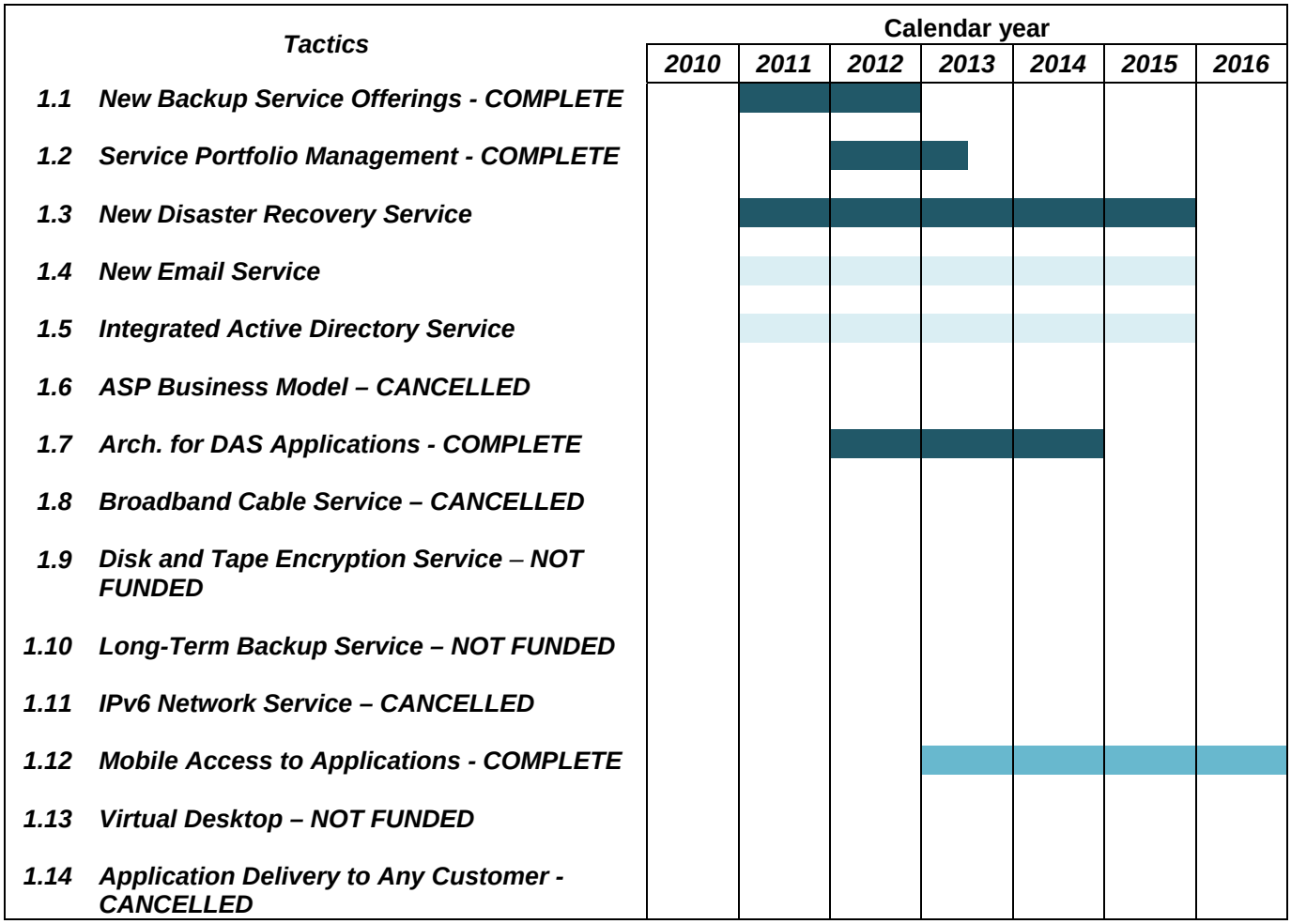
1 – 25% growth of statewide shared technology infrastructure

Expand our Computing Services customer base to take full advantage of cost savings and cost avoidance through larger volume discounts and efficiencies.

2 – Statewide shared service applications serve 80% of state employees

Implement new enterprise IT offerings and replace old shared legacy applications that no longer effectively meet business requirements. Scope of replacements should include replacing shadow systems, databases, etc. created to mitigate legacy systems inability to meet current business requirements.

Goal 1. Expand Statewide IT Services



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Tactics		Status
1.1	**New Backup Service Offerings** Implement new Backup Service offerings – backup and restore capabilities for new and existing customers	Completed
1.2	**Service Portfolio Management** Implement Service Portfolio Management – methodology for identifying, developing and implementing new service offerings and receiving new customers	Completed
1.3	**New Disaster Recovery Service** Implement new Disaster Recovery Service offerings – provide local and remote DR choices for existing and new customers	In Progress (70%)
1.4	**New Email Service** Implement new Email Service offerings – provide statewide email as a shared service available to all Agencies	On Hold (70%)

1.5	**Integrated Active Directory Service** Implement Integrated Active Directory Service offerings – provide secure foundation to support shared services offerings	On Hold (90%)
1.6	**ASP Business Model** Implement Application Service Provider (ASP) Business Model – define and implement the ASP service including service catalog definitions and rate model	Cancelled
1.7	**Architecture for DAS Applications** Define the architecture for DAS applications – define business, data, and technology architectural components and relationships. Determine opportunities for standardization and streamlining and improve impact analysis capabilities	Completed
1.8	**Broadband Cable Service** Implement Broadband Cable Service – provide cable signal delivered over the data network (e.g., viewing legislative sessions)	Cancelled
1.9	**Disk and Tape Encryption Service** Implement Disk and Tape Encryption Service – provide disk and tape encryption capabilities to help meet regulatory and audit requirements	Not Funded
1.10	**Long-Term Backup Service** Implement Long-Term Backup Service – provide customers the ability to selectively move files to an archive storage tier with low usage/low media cost profile	Not Funded
1.11	**IPv6 Network Service** Implement IPv6 Network Service – provide capabilities to exploit features of IPv6 network protocol (Content merged into tactic 4.6 Technical Roadmap)	Cancelled
1.12	**Mobile Access to Applications** Implement technologies to provide mobile access to applications – e.g., MS Office on Smartphones, expanded Citrix capabilities	Completed
1.13	**Virtual Desktop** Provide a solution for enterprise customers (support 20k customers) to enable consistent work tools while reducing support costs	Not Funded
1.14	**Application Delivery to any Customer** Provide Application delivery Services to any ETS Customer in the shared application delivery platform or customer's environment	Cancelled

Goal 2 – Support Customers Business Initiatives

Ensure that IT services appropriately align with customer business needs. Provide technology choices aligned to business needs, enabling informed technology investment decisions that add value to desired business outcomes.

Goal Alignment

This goal primarily supports the guiding principle:

- **Provide reliable, agile and flexible statewide service choices**

This goal contributes to the guiding principles:

- **Enable growth and statewide transformation opportunities**
- **Optimize statewide IT Investments**

Outcome Alignment

This goal supports the following outcomes:

- **Scalable IT Architecture** – Ensures technology is flexible to support new business, growth and change
- **Cost Effective IT Solutions** – Provides IT solutions that optimize statewide IT investments
- **New Systems and Legacy Replacements** – Provides technology solutions that support the changing business environments

Key Strategies

- Understand and participate in customers' IT initiatives
- Architect or Broker IT solutions
- Staff and coordinate delivery teams

End State Objectives

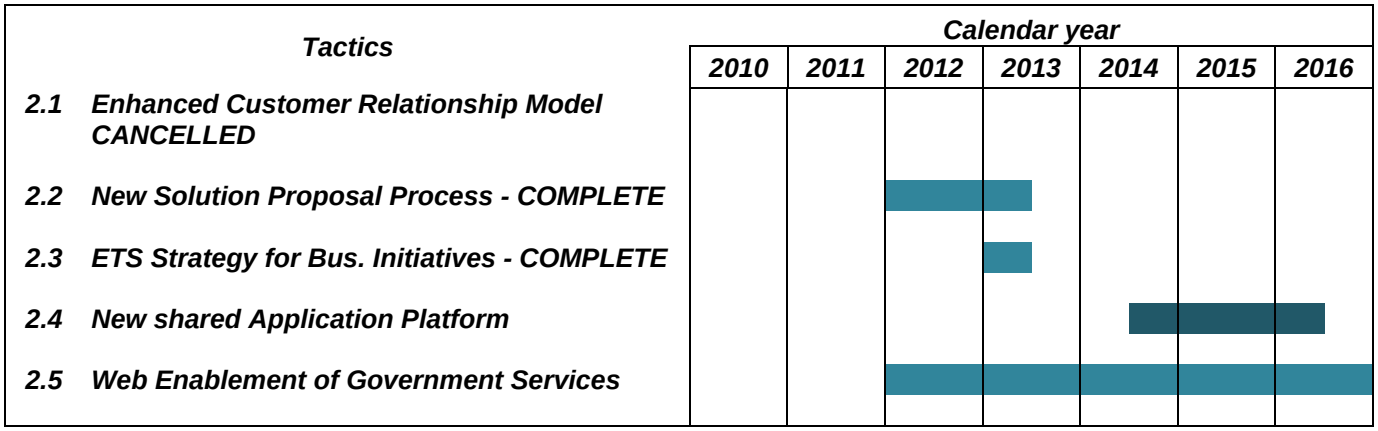
1 – Solution alternatives documented and presented 100% of the time

Solution alternatives are explored, documented and presented to customers for consideration.

2 – Proposed solutions address critical business requirements 100% of the time

Customer requests often define mandatory and desired features, as well as specific technical configurations. This objective ensures that solutions meet mandatory business requirements, leaving specific technical infrastructure configurations to ETS.

Goal 2. Support Customer Business Initiatives



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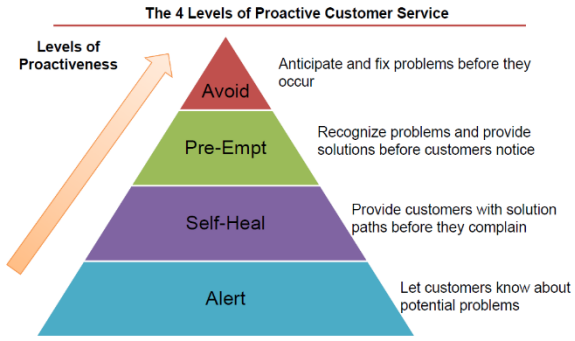
Tactics	Status
2.1 Enhanced Customer Relationship Model Implement enhanced customer business relationship model – implement strategies to enhance alignment with Agency business such as concierge services and implement an ongoing Business Relationship Management program (Content merged into tactic 3.1 Customer Service Strategy)	Cancelled
2.2 New Solution Proposal Process Implement new solution proposal management process – establish methodology for gathering customer requirements and architecting and pricing alternative solutions proposals	Completed
2.3 ETS Strategy for Business Initiatives Implement strategy for coordinated ETS support of business initiatives – e.g., daily review at 8:35 meeting for BHIP and Orkids	Completed
2.4 New Shared Application Platform Architect and implement a new Shared Application Platform for DAS Business Lines and for any ETS Customer	In Progress (25%)
2.5 Web Enablement of Government Services Investigate and develop new opportunities for enabling government agency interaction with the public, and delivery of government services to Oregon citizens using web and mobile technologies	Ongoing

Goal 3 – Provide Proactive Customer Service

Proactive customer service improves the overall customer service experience. Service interruptions will be detected and resolved prior to customer awareness. Simple mechanisms will enable customers to self-help or obtain assisted help. These practices will free technical resources to assist with more complex customer issues.



Goal Alignment

This goal primarily supports the guiding principle:

- **Provide reliable, agile and flexible statewide service choices**

This goal contributes to the guiding principles:

- **Enable growth and statewide transformation opportunities**
- **Optimize statewide IT Investments**

Outcome Alignment

This goal supports the following outcomes:

- **Reliable IT Systems –** Ensures state systems are reliable and available for staff, citizens, and private business use
- **Cost Effective IT Solutions –** Provides IT solutions that optimize statewide IT investments

Key Strategies

- Automate routine problem solving before customer is aware
- Provide easy self-service options
- Manage to specific service levels
- Provide customer assistance non-routine requests or problems

End State Objectives

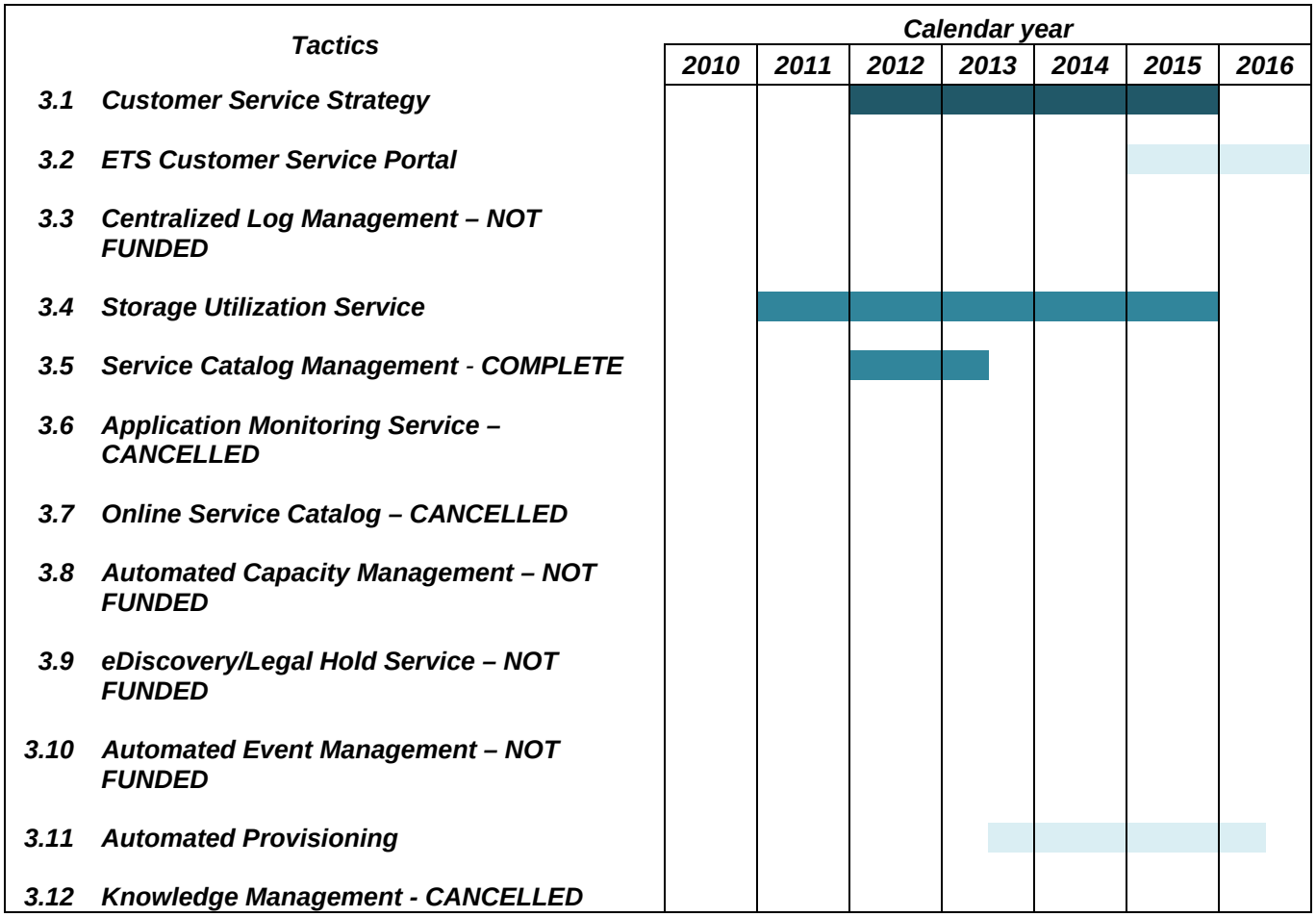
1 – 80% of routine problems are automatically resolved prior to customer awareness

Develop or enhance the automation and usage of system communication tools and methods to monitor and report problems prior to customer awareness.

2 – Sustained 90% Customer Satisfaction Rating

Develop continuous improvement processes to monitor and resolve common cause issues to yield a 90% customer service experience rating.

Goal 3. Provide Proactive Customer Service



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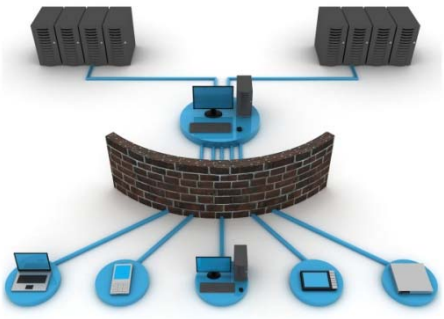
Tactics	Status
3.1 Customer Service Strategy Implement customer service strategy – define the Customer Service Ethic for the ETS organization; presales outreach; customer onboarding and retention; and customer service training for staff. Implement strategies to enhance alignment with Agency business such as concierge services and an ongoing Business Relationship Management program	In Progress (90%)
3.2 ETS Customer Service Portal Implement ETS Customer Service Portal – provide improved tools and services (e.g., chat capability, ticket review, self-service options)	On Hold (0%)
3.3 Centralized Log Management Implement centralized log management – tools and processes that review and summarize log records to support event, security, capacity, and configuration management	Not Funded

Tactics		Status
3.4	**Storage Utilization Service** Implement Storage Utilization Service – enhance visibility of disk utilization for the ETS and its customers to assist with reporting, billing, and archiving/removing files	In Progress (15%)
3.5	**Service Catalog Management** Implement Service Catalog Management – restructure the service catalog to fit the full-cost maturity model and introduce lifecycle management for it	Completed
3.6	**Application Monitoring Service** Implement Application Monitoring Service – develop new service to monitor all components supporting a customer's application	Cancelled
3.7	**Online Service Catalog** Implement Online Service Catalog – provide service descriptions and costs based on full-cost maturity data, allowing customer to input requirements and generate an estimate for most services	Cancelled
3.8	**Automated Capacity Management** Implement Automated Capacity Management – ensuring that the capacity of IT services and the IT infrastructure is able to deliver agreed service level targets in a cost-effective and timely manner; includes projecting capacity requirements, setting and monitoring thresholds, and trending usage	Not Funded
3.9	**eDiscovery/Legal Hold Service** Implement eDiscovery/Legal Hold Service – self-service ability to search through any discoverable data and selectively place legal holds on that information	Not Funded
3.10	**Automated Event Management** Implement and automate Event Management – coordinated monitoring and automatic responses to common events using a cross-platform dashboard	Not Funded
3.11	**Automated Provisioning** Implement Automated Provisioning – technician-driven or self-service tools that automate the process of provisioning standard infrastructure services (e.g., servers)	On Hold (10%)
3.12	**Knowledge Management** Implement Knowledge Management – tools and processes to capture information about service delivery procedures and ticket information and make it readily accessible (Content merged into tactic 6.6 IT Service Management)	Cancelled

Goal 4 – Optimize and Protect IT Resources



Provide a well-designed and architected secure computing and communications environment to ensure optimal service delivery to business.

Architecture and process will be optimized to support agile, reliable and secure computing and communication services.

Goal Alignment

This goal primarily supports the guiding principle:

- **Optimize statewide IT investments**

This goal contributes to the guiding principles:

- **Provide reliable, agile and flexible statewide service choices**
- **Enable growth and statewide transformation opportunities**

Key Strategies

- Architect for maximum delivery speed, agility, utilization and reliability
- Architect security environment to defined business requirements
- Architect for customer choices

Outcome Alignment

This goal supports the following outcomes:

- **Scalable IT Architecture –** Ensures technology is flexible to support new business, growth, change
- **Enhanced Security –** Ensures that all state technology meets minimum security requirements consistently
- **New Systems and Legacy Replacements –** Provides technology solutions that support the changing business environments

End State Objectives

1 – 80% of standard servers delivered within two business days

Provisioning and delivery processes are standard, agile and efficient in order to reach the two-business day objective.

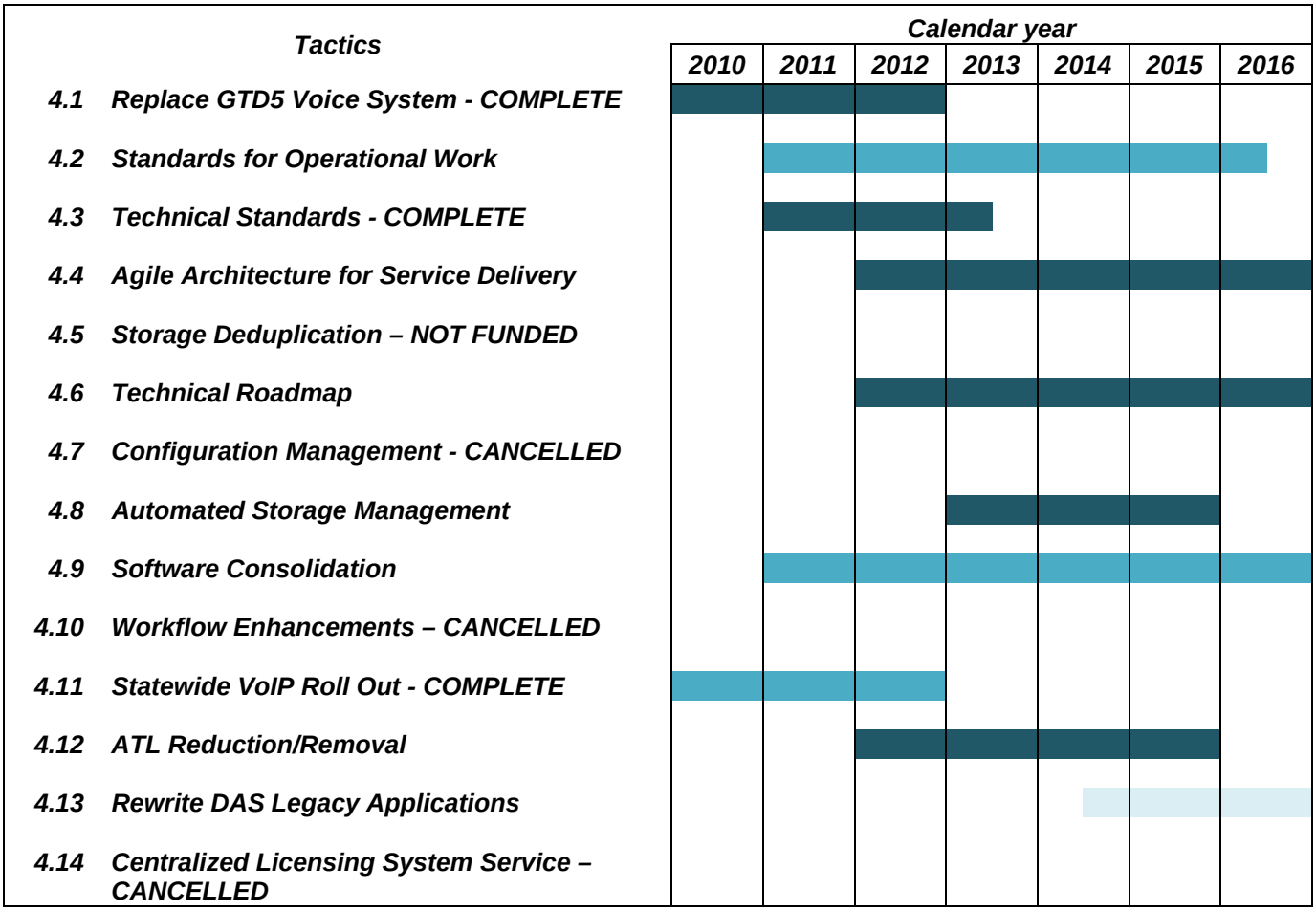
2 – 100% of solutions engineered prior to hand-off for delivery to business

A detailed, complete service solution based on customer requirements is engineered and documented prior to hand-off for delivery to the business.

3 – 80% of standard work delivered using agile structure and repeatable process

Consistent processes and procedures are utilized in implementation and support of delivered solutions.

Goal 4. Optimize and Protect IT Resources



The darker the bar, the higher the priority

Tactics	Status
4.1 Replace GTD5 Voice System Replace GTD5 Voice System – converge the old voice system with the data network to eliminate voice circuits; reduce cost; provide central management of voice service; and enhance the voice feature set available to customers	Completed
4.2 Standards for Operational Work Develop standards for operational work – standardize, document and automate where possible, procedures for all highly-repeatable or routine operational work and processes (e.g., provisioning process)	In Progress (70%)
4.3 Technical Standards Develop Technical Standards – determine and document standards for technical platforms (e.g., security for types of information and systems; application/database/computing standards)	Completed

Tactics		Status
4.4	**Agile Architecture for Service Delivery** Implement Agile Architecture for Service Delivery – infrastructure and delivery methods that enable quick processing of service requests (e.g., centrally-managed, redundant firewalls, and simplified network with centralized management)	In Progress (15%)
4.5	**Storage Deduplication** Implement Deduplication for Backup and Primary Storage – reduce disk requirements and slow the storage growth rate by eliminating duplicated data	Not Funded
4.6	**Technical Roadmap** Create and Execute Technical Roadmap – document and implement planned technology upgrades, acquisitions and standards for the next five years	Ongoing
4.7	**Configuration Management** Implement Configuration Management – automated capability to maintain information about configuration items required for delivering an IT service, including their relationships (Content merged into tactic 6.6 IT Service Management)	Cancelled
4.8	**Automated Storage Management** Implement automated Storage Management – provide efficiencies through automatic migration of data to the appropriate storage tier based on usage	In Progress (33%)
4.9	**Software Consolidation** Identify and implement software consolidation for shared services – e.g., mainframe emulation tool, standard desktop images	Ongoing
4.10	**Workflow Enhancements** Implement workflow enhancements based on the new organization structure – document service delivery workflow within the new organization structure then apply LEAN techniques and automation to streamline service delivery	Cancelled
4.11	**Statewide VoIP Roll Out** Roll out Voice over IP (VoIP) infrastructure across the state – build on the converged telecom environment by migrating customers to VoIP	Completed
4.12	**ATL Reduction/Removal** Reduce or retire the Automated Tape Library (ATL) – replace the ATL with disk arrays	In Progress (90%)
4.13	**Rewrite DAS Legacy Applications** Rewrite DAS legacy systems utilizing the new Shared Application Platform architecture to gain application performance improvements and future maintenance efficiencies, and identify opportunities for DAS application consolidation	In Progress (10%)
4.14	**Centralized Licensing System Service** Provide three avenues for agencies to replace their existing licensing systems with an electronic licensing web service (Content merged into tactic 2.5 Web Enablement of Government Services)	Cancelled

Goal 5 – Leverage Multi-Sourcing

Multi-sourcing allows Enterprise Technology Services to meet efficiently the needs of customers by providing scalable solutions in a timely and cost effective manner. By multi-sourcing IT services, we can improve service levels and enable access to specialized vendors and emerging technologies.

Goal Alignment

This goal primarily supports the guiding principle:

- **Enable growth and statewide transformation opportunities**

This goal contributes to the guiding principles:

- **Provide reliable, agile and flexible statewide IT service choices**
- **Optimize statewide IT investments**

Key Strategies

- Develop criteria to broker services
- Maximize sourcing strategies to enable delivery of services
- Architect to support and secure brokered services
- Leverage new technologies and industry experts

Outcome Alignment

This goal supports the following outcomes:

- **Scalable IT Architecture –** Ensures technology is flexible to support new business, growth, change and choice
- **New Systems and Legacy Replacements –** Provides technology solutions that support the changing business environments
- **Cost Effective IT Solutions –** Provides IT Solutions that optimize the statewide investments

End State Objectives

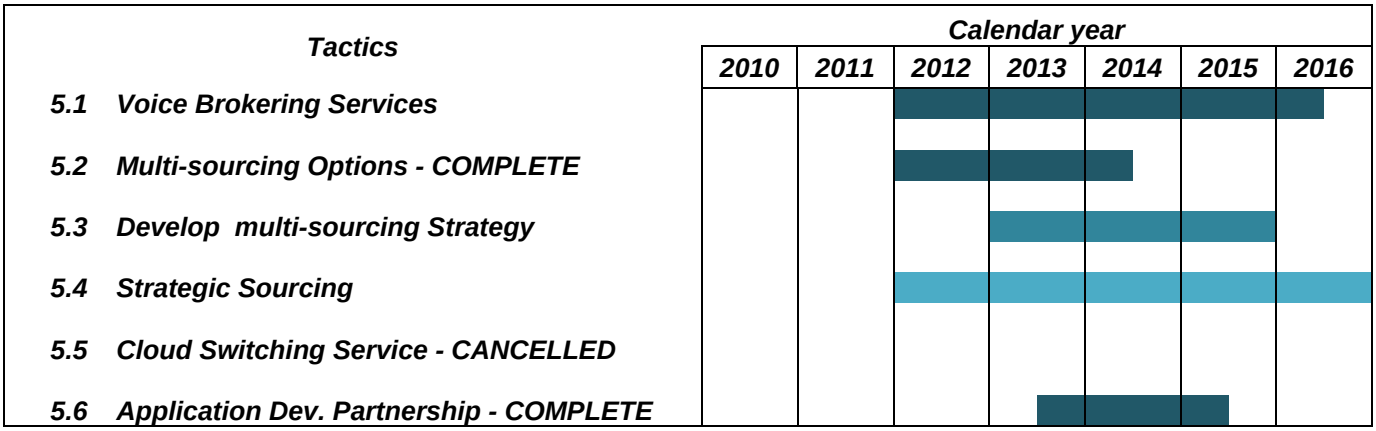
1 – Increased use of external providers facilitates 25% growth expectation

The state continues to expand the use of technology to meet the growing needs of Oregonians. By utilizing multi-sourcing, we can more rapidly deploy and support these environments.

2 – Services brokered to avoid staff overload when demand exceeds resources

By pre-establishing contracts with vendors we can rapidly provide IT solutions to meet growing customer need, while enabling existing staff to focus on supporting and enhancing IT services.

Goal 5. Leverage Multi –Sourcing



The darker the bar, the higher the priority

Tactics	Status
5.1 Voice Brokering Services Broker Voice Services – establish and transition to contracts with voice vendors to provide expanded managed services	In Progress (55%)
5.2 Multi-sourcing Options Implement multi-sourcing options – broker contracts for hardware and software capacity to host applications needs (e.g., security log monitoring, voice services, software as a service for online time entry, agency applications)	Completed
5.3 Develop Multi-Sourcing Strategy Develop multi-sourcing strategy – define guidelines for when to source work internally and when to use external sourcing (e.g., staff overload, time to respond, non-standard request, capacity shortages, skill shortages, cost)	In Progress (75%)
5.4 Strategic Sourcing Monitor, maintain, and support strategic sourcing capabilities – review services and delivery models to ensure that the most efficient and cost effective method of service delivery is achieved; internal and external providers will be evaluated (e.g., EGov, voice and data network services)	In Progress (25%)
5.5 Cloud Switching Service Implement Cloud Switching Service – seamlessly and securely connect our network to private and public cloud provider's networks enabling mixed service delivery capabilities	Cancelled
5.6 Application Development Partnership Create a partnership (with inter-governmental agreements and process) with Oregon Universities to help assist in the development of applications for the State of Oregon. This will help college students gain experience while providing ETS staff augmentation when the demand is high.	Completed

Goal 6 – Maintain Competitive Business Model

Maintain a competitive business model that ensures organizational efficiencies, competitive and flexible rate structure, continuous scanning of future opportunities and knowledge of client business needs.

Goal Alignment

This goal supports primarily the guiding principle:

- **Optimize statewide IT investments**

This goal contributes to the guiding principles:

- **Enable growth and statewide transformation opportunities**
- **Provide reliable, agile and flexible statewide service choices**

Outcome Alignment

This goal supports the following outcome:

- **Cost Effective IT Solutions** – Provides IT solutions that optimize statewide IT investments

Key Strategies

- Pursue flexible and efficient funding
- Benchmark against competition
- Implement clear and efficient delivery organization
- Implement rates so customer controls costs via service choice

End State Objectives

1 – By 13/15, funding and rates align with Entrepreneurial Management

Deploy full-cost methodology across ETS to enable customers to understand clear service choices and costs. Pursue removal of artificial spending caps to allow ETS to respond to customer service demands.

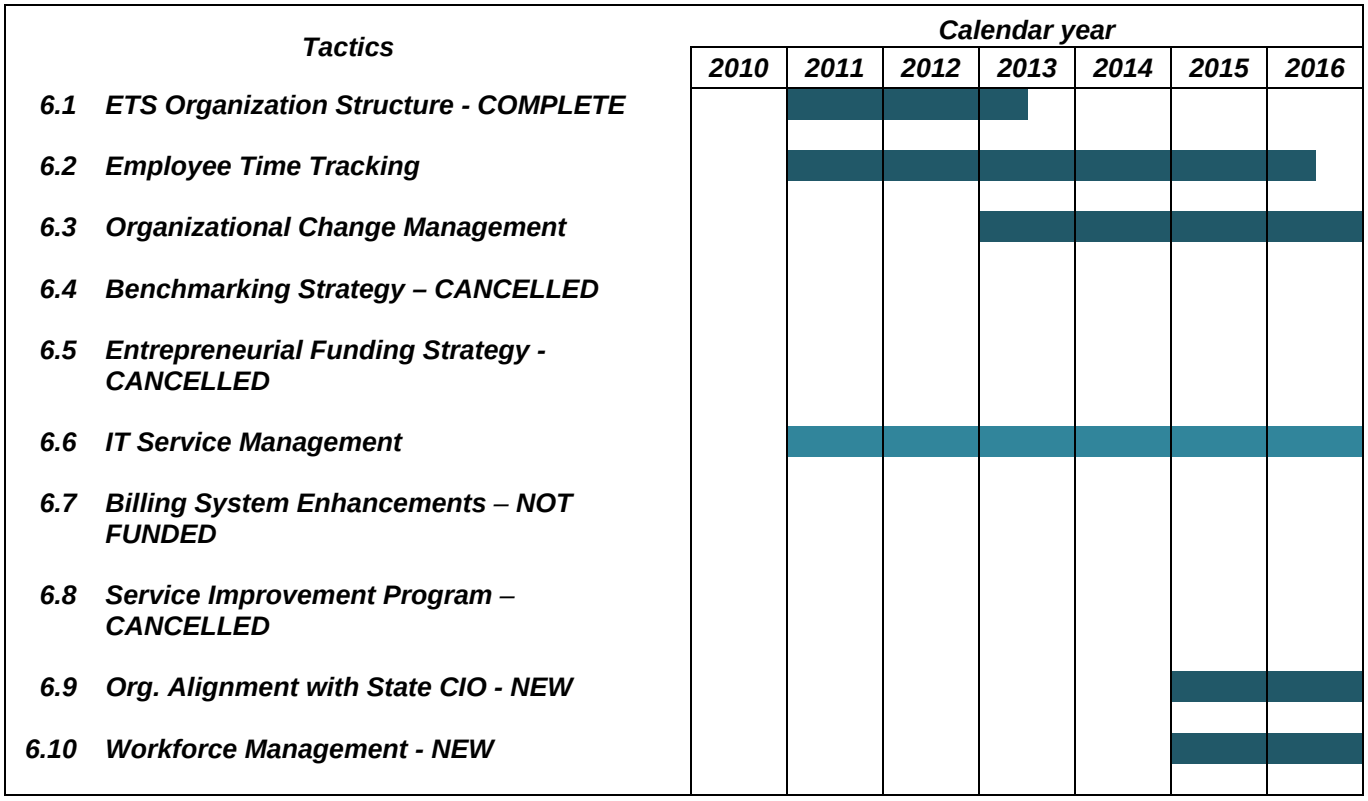
2 – Benchmark reviews conducted annually

Identify generally accepted benchmark standards from Gartner and industry that will be used to validate ETS standards. Annually review business operations against standards.

3 – Accountability aligns to strategies at unit and individual level by 7/1/12

Clearly define organizational structures. Create clear definitions that support alignment for strategic, tactical and individual accountability.

Goal 6. Maintain Competitive Business Model



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Tactics	Status
6.1 ETS Organization Structure Develop and implement an organization structure that supports Entrepreneurial Management (EM) – identify roles, functional units, and reporting structure to best support strategic goals, outcomes, and customer service ethic; modify position descriptions as needed, reassign staff to new positions and cross train	Completed
6.2 Employee Time Tracking Implement employee time tracking – support time collection to accurately determine the actual cost of service delivery	In Progress (50%)
6.3 Organizational Change Management Implement Organizational Change Management strategy – build on organizational change methods to shift to the EM model; includes implementing skill-based staffing plan for new organization	In Progress (20%)
6.4 Benchmarking Strategy Develop strategy for benchmarking – define scope and guidelines for periodic comparison to external benchmarks (e.g., rates, brokering, ITSM, environmental scans)	Cancelled

Tactics		Status
6.5	**Entrepreneurial Funding Strategy** Develop and implement funding strategy that supports the EM business model – seek change to non-limited budget and funding for ventures outside of rates	Cancelled
6.6	**IT Service Management** Continuous implementation of priority IT Service Management processes based on IT Infrastructure Library (ITIL) – determine biennial priorities and target maturity levels; track progress against targets; define and track process metrics	Ongoing
6.7	**Billing System Enhancements** Implement billing system enhancements – support full-cost maturity services; streamline and automate billing support processes for midrange, storage and self-provisioning	Not Funded
6.8	**Service Improvement Program** Implement Service Improvement Program – formalize methods, tools, and mindset to support regular discussion on common cause issues to develop solutions and closed loop corrective actions; continually engage staff in identifying areas where resource and work optimization can occur (Content merged into tactic 6.6 IT Service Management)	Cancelled
6.9	**Organizational Alignment with State CIO - NEW** Develop and implement plans to merge ETS into the office of the State CIO – develop business and strategic plans that align with the SCIO's strategic plan, the Stage Gate Process and other SCIO services. Identify roles, functional units and reporting structure to best support strategic goals and desired outcomes with minimum interruption to delivery and support of services; Modify position descriptions as needed, reassign staff to new positions and cross train.	In Progress (10%)
6.10	**Workforce Management - NEW** Develop a strategy and plan to implement clear structures around workforce management, workforce development, and position management. Development of an engaged and productive workforce directly supports the ongoing sustainability and performance of the IT service organization to support increased customer demand. This business process improvement initiative is to analyze and refine ETS processes to ensure ETS is doing business effectively, efficiently as possible, and enable the organization to achieve its strategic goals.	In Progress (50%)

Strategic Roadmap

Implementing the Plan

It will take significant work effort to execute the tactics identified for each strategic goal while still providing day-to-day service and maintaining the state's IT investments. The IT world is constantly changing. There are inducements daily to try new products and improved techniques that could enhance our delivery capabilities and help us better support our customers.

To avoid losing track of our goals, we must continually review our plan and assess whether we are on track. We must judge each new opportunity presented in the marketplace to determine if it will help us or hinder us in reaching our goals. There may even be innovations that will cause us to alter the goals themselves.

Criteria for Projects, Initiatives and Operations

No individual group has the right to start a Proof of Concept (POC) or prototype implementation that is not within the strategic roadmap, without approval of the ETS management team. To be considered for resourcing, all projects, initiatives and operations must align with the strategic roadmap, the technical roadmap and will be assessed against the following criteria:

- Supports one or more strategic objectives
- Supports one or more strategic goals
- Provides savings/cost avoidance and benefits that are quantifiable and material
- Has a clear definition of the underlying business problem to be resolved
- ETS management agrees that the underlying business problem needs to be resolved and that the proposal will solve the underlying business problem
- Provides new or enhanced services that materially enhance revenue generation
- Enhances the credibility and visible value of ETS to government in Oregon

The Roadmap

The tables below summarize the tactics and timeframes for implementation for each of the six strategic goals. This roadmap will be reviewed and updated annually. Please refer to Appendix B for information on funding source and alignment between tactics, strategies and objectives for each goal.

Goal 1. Expand Statewide IT Services

Tactics	Calendar year						
	2010	2011	2012	2013	2014	2015	2016
1.1 New Backup Service Offerings - COMPLETE							
1.2 Service Portfolio Management - COMPLETE							
1.3 New Disaster Recovery Service							
1.4 New Email Service							
1.5 Integrated Active Directory Service							
1.6 ASP Business Model – CANCELLED							
1.7 Arch. for DAS Applications - COMPLETE							
1.8 Broadband Cable Service – CANCELLED							
1.9 Disk and Tape Encryption Service – NOT FUNDED							
1.10 Long-Term Backup Service – NOT FUNDED							
1.11 IPv6 Network Service – CANCELLED							
1.12 Mobile Access to Applications - COMPLETE							
1.13 Virtual Desktop – NOT FUNDED							
1.14 Appl. Deliv. to Any Customer - CANCELLED							

The darker the bar, the higher the priority

Goal 2. Support Customer Business Initiatives

Tactics	Calendar year						
	2010	2011	2012	2013	2014	2015	2016
2.1 Enhanced Cust. Rel. Model – CANCELLED							
2.2 New Solution Proposal Process - COMPLETE							
2.3 ETS Strategy for Bus. Initiatives - COMPLETE							
2.4 New shared Application Platform							
2.5 Web Enablement of Govt. Services							

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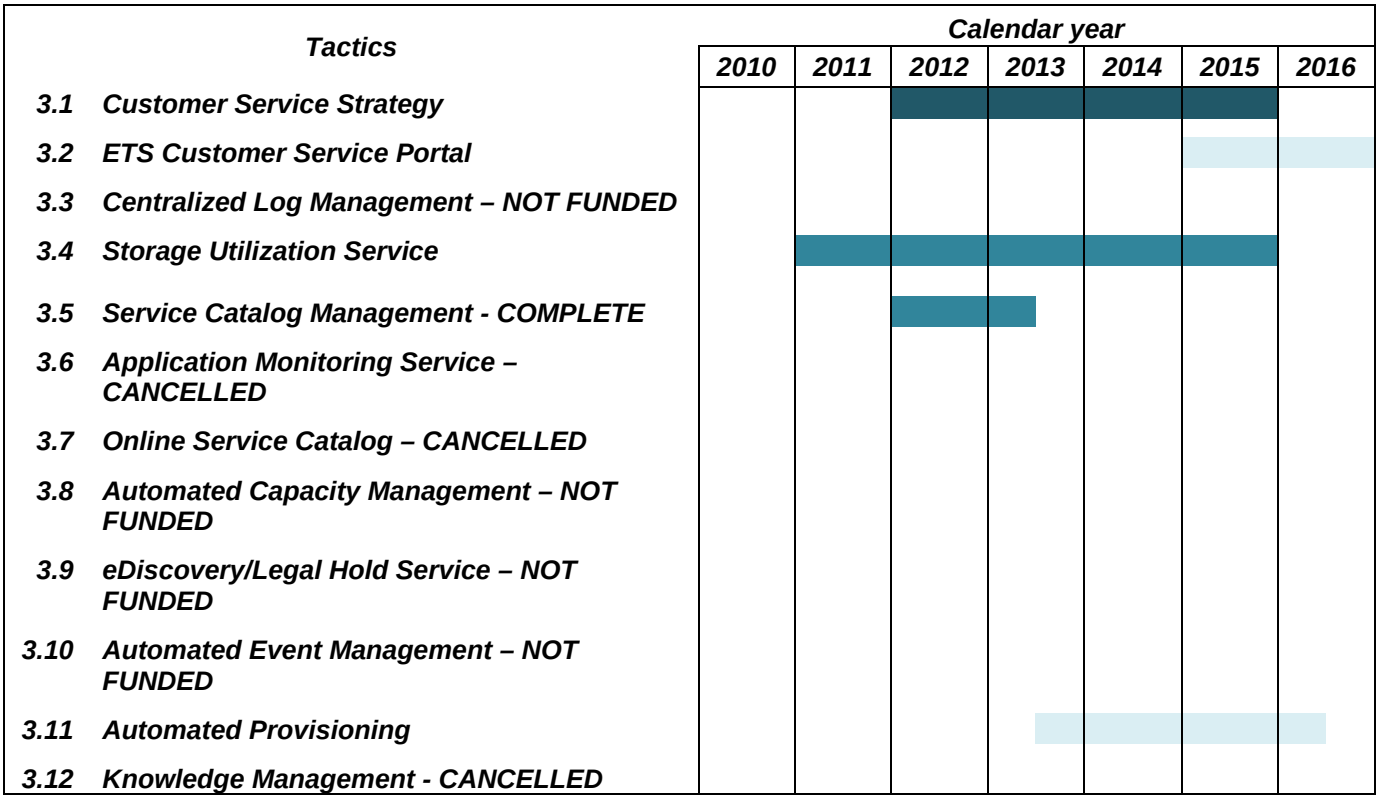
Goal 3. Provide Proactive Customer Service



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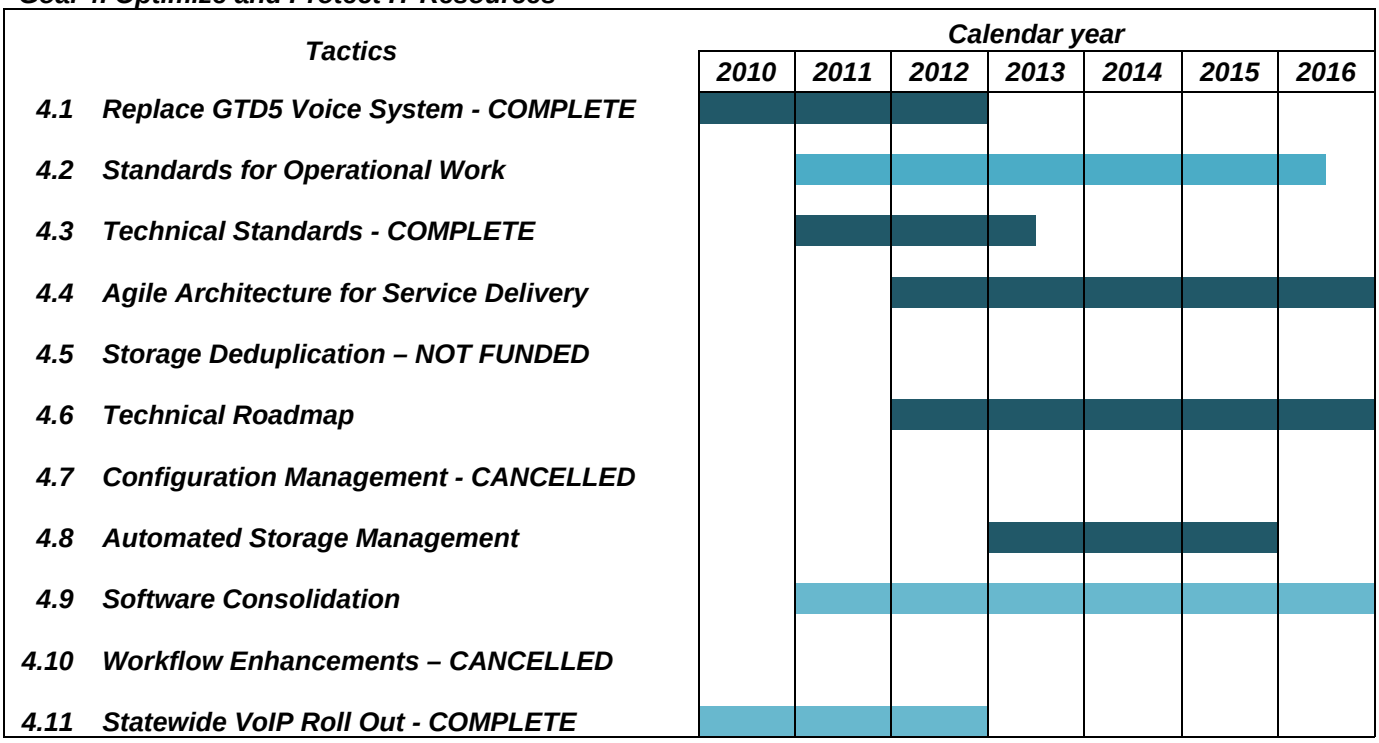
Goal 4. Optimize and Protect IT Resources



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Goal 4. Optimize and Protect IT Resources (cont.)

Tactics	Calendar year						
	2010	2011	2012	2013	2014	2015	2016
4.12 ATL Reduction/Removal							
4.13 Rewrite DAS Legacy Applications							
4.14 Centralized Licensing System Service – CANCELLED							

The darker the bar, the higher the priority

Goal 5. Leverage Multi-Sourcing

Tactics	Calendar year						
	2010	2011	2012	2013	2014	2015	2016
5.1 Voice Brokering Services							
5.2 Multi-Sourcing Options							
5.3 Develop Multi-Sourcing Strategy							
5.4 Strategic Sourcing							
5.5 Cloud Switching Service - CANCELLED							
5.6 Application Dev. Partnership - COMPLETE							

The darker the bar, the higher the priority

Goal 6. Maintain Competitive Business Model

Tactics	Calendar year						
	2010	2011	2012	2013	2014	2015	2016
6.1 ETS Organization Structure - COMPLETE							
6.2 Employee Time Tracking							
6.3 Organizational Change Management							
6.4 Benchmarking Strategy – CANCELLED							
6.5 Entrep. Funding Strategy - CANCELLED							
6.6 IT Service Management							
6.7 Billing System Enhance. – NOT FUNDED							
6.8 Service Imp. Program – CANCELLED							
6.9 Org. Alignment w State CIO - NEW							
6.10 Workforce Management - NEW							

The darker the bar, the higher the priority

ETS Primary Product Sets or Services

Managed Computing Services	Managed Computing Services provides hosting for mainframe and server based applications. We offer competitive computing platforms with flexibility and choice to meet the varying needs of state and local government. This enables us to meet any computing need, small or large, that our customers may have. All platforms are built using best practice and state security standards, and are maintained and monitored, to ensure a reliable computing experience.
Data Storage Services	Data Storage Services provides highly available disk for all server platforms at a highly competitive cost per unit. We offer your business a wide range of storage and backup choices for all computing platforms and locations depending on your requirements. We also provide options for safeguarding your data, skilled staff and tools to self-manage and analyze your storage costs.
Data Network Services	Network Services provides secure and reliable access to the data and technology you need to do your business. We offer scalable, flexible communication technologies to your individual business environment. Our network is also designed for flexibility to meet your federal and state requirements for secure transport of data. All of the hosted systems and their private/public data are secured consistently to ensure that they are protected at the state's highest security standards.
IT Professional Services	IT Professional Services offers a broad range of skilled IT professionals to assist with your technology needs. Sometimes, the specific IT skill set you need is not readily available within your organization to troubleshoot applications, improve your systems and assist with complicated network and infrastructure configurations. We offer technical expertise in computing, network, storage, infrastructure, planning and security. Our professional services can help you address temporary, short-term needs as an extension of your organization, as you need them.
Application Services	Application Services manage and distribute enterprise shared software solutions to customers across the state network from our central data center. We provide the shared business model and infrastructure to acquire, support and maintain enterprise class applications, such as email, to allow all state agencies to share a common business application.

Workplace Productivity Services	Workplace Productivity Services offers resources to securely and reliably connect people to information. These include desktop and mobile computing, telephones, SmartPhones, and other workplace technologies that support your business. The combination of flexible technology choices and standard deployments enables us to meet the varying needs of government customers.

Appendix A. Alignment to EIRMS and HB 3099

Prior versions of the ETS Strategic Plan have shown the alignment between ETS planned outcomes, goals and strategies to the goals and strategies of the 2010 – 2015 Enterprise Information Resource Management Strategic Plan. In 2015, a new Enterprise Information Resource Management Strategy was created for 2015 – 2020. Also in 2015, HB 3099 was passed. The bill transfers certain duties, functions and powers related to enterprise information technology and telecommunications from DAS to the state CIO.

In response to these two events, a new tactic has been added to the ETS strategic plan – 6.9 Organizational Alignment to State CIO. The materials in this appendix summarize information from these two documents that will be used to guide planning of projects and initiatives for this tactic and subsequent strategic planning efforts.

Highlights of Enterprise Information Resource Management Strategic Plan 2015 - 2020

Guiding Principles

- **Business-driven -** Information resource management is focused on achievement of state and agency mission objectives and the overarching operational requirements of government.
- **Oversight, Control, and Transparency -** Effective oversight and control mechanisms guide information resource investments, deployment and use.
- **Iterative Progress and Solutions –** Incremental approaches to both solution design and implementation in an iterative process will be incorporated into our meta-models for process definitions.
- **Innovation –** Innovation is the hallmark of relevant IT solution providers. IT solutions which are not innovative are utility services, where quality is uniform among providers with the only differences which make a difference being price.
- **Risk Tolerance -** Risk tolerance and management too tightly controlled can keep solutions from meeting business needs. Ensuring risk exposure is empirically articulated is an important aspect to IT governance and project management.
- **Optimization –** Through the process of governance, IT solutions which address common business needs and would lend themselves to shared services will support optimization by reducing the entropy necessary to sustain the resulting systems.
- **Changeability / Adaptability -** Develop project plans and solutions that can respond to change or adapt in response to emerging challenges or opportunities evolve.
- **Security Foundation -** Information security and integrity provides the foundation for optimized government operations, making every agency's contribution to that fabric of trust critical. Due diligence in the realm of information security and integrity is an imperative.
- **Measured Achievement and Value -** Ensure achievement and accrued value are incrementally measured and routinely reported as a means to verify and validate achievement and performance.

State Priorities:

- Transparency & Open Government
- Stakeholder Focus
- Enterprise Architecture
- Business Intelligence/Complex Analytics
- Project Oversight

IT Strategic Direction:

- **Focus of Services** - Units of government that do not provide direct service to external stakeholders are considered internal services. It is important to ensure these internally-focused services clearly align with and promote target outcomes and follow the organization's reason for existence.
- **Value Proposition -** State government exists to produce worthwhile and valuable results for citizens. Which needs for what people at whose expense must be answered through a process of governance to inform the evaluation, prioritization and decision-making about services.
- **10-Year Plan -** The State of Oregon has adopted the Governor's 10-Year Plan for Oregon[1] organizing a range of key services into six outcome areas. They are: Education; Jobs and the Economy; Sustainable Environment; Healthy Citizens; Safe Place to Live; and, Efficient & Effective Government.
- **Key Initiatives -** The Office of the State CIO has been established as an internal service provider partner for other agencies and their service providers. The goal is to use the unique view and position of this office in state government to gather and focus practices, resources and expertise to help partners achieve their defined target outcomes and ensure the needs and priorities of the organization and the state are balanced

Strategic Initiatives

1. Alignment of IT Governance to the Ten Year Plan
2. IT Governance Focus
3. IT Governance Success Factors
4. Strategic Technology Office

IT Initiatives

1. IT Project Flow
2. Project Portfolio Management Program
3. IT Governance Measurement
4. Stage Gate Oversight and Incremental Value Delivery
5. Enterprise Architecture
6. Meta Model Framework for IT Oversight
7. Administrative Information Systems and Package Enabled Re-Engineering
8. Asset Inventory and Security Analysis
9. Geographic Information Systems

Highlights of HB 3099

Information in this section has been extracted from the Oregon Legislative Information System and reflects the C-Engrossed version of the bill. As of 7/31/15, the bill is in the Governor's office, awaiting signature.

WHAT THE MEASURE DOES:[2]

"Provides that State Chief Information Officer (CIO) is the primary advisor to the Governor on information technology (IT) and telecommunications. Provides that State CIO duties are specified by the Governor. Transfers authority for IT and telecommunications policy, including planning, rulemaking, standard setting, and oversight from Department of Administrative Services (DAS) to State CIO. Retains DAS authority and responsibility for statewide IT and telecommunications operations and services but requires those operations and services to be

[1] 10-Year Plan for Oregon

[2] Source is Staff Measure Summary for HB3099 C, prepared for the Joint Committee on Ways and Means by Sean McSpaden

provided in a manner consistent with the rules, policies and standards adopted by the State CIO. Retains DAS authority for IT procurement. Provides authority for State CIO to review IT solicitation documents and all IT procurements over $1 million, and to direct state agencies to include State CIO as contracting party on behalf of state. Provides authority for State CIO to approve, modify or stop IT projects and approve, suspend or cancel IT contracts over $1 million."

Analysis:[3]

"The measure transfers policy, planning, oversight and operational authority for Enterprise IT and Telecommunications from the Department of Administrative Services (DAS) to the State Chief Information Officer (SCIO). While the bill maintains the Office of the SCIO as a component of DAS, it clarifies that specified duties of the SCIO are under the direction of the Governor and provides that the Governor will resolve any dispute between the SCIO and DAS relating to the provisions of this bill. Other major provisions of the bill include:

- Requires DAS and state agencies to follow rules, policies and standards adopted by the SCIO
- Requires the SCIO to review all information technology contracts of $1 million or more and authorizes the SCIO to review and approve all information technology and telecommunications contracts prior to the contracts being released
- Specifies when the SCIO has the authority to approve, pause or stop IT projects
- Specifies that the SCIO is responsible for the Enterprise Information Resources Management Strategy
- Outlines work and reports of agencies that must align with and support the Enterprise Information Resources Management Strategy
- Maintains current authority of agencies for their own IT operations and procurement
- Allows the DAS director to delegate additional procurement authority to the SCIO
- Authorizes the SCIO to make all administrative and organizational decisions for the Office of the SCIO
- Makes the SCIO responsible for specified work groups, advisory boards and committees
- Creates the Information Technology Operating Fund to be used for the expenses of the Office of the SCIO
- Requires the offices of the Secretary of State and the State Treasurer to submit specified information to the Legislative Fiscal Officer and to adopt, in collaboration with the SCIO, information technology and telecommunications plans, policies, standards and procedures that are, to the extent possible, compatible with those adopted for all other state agencies"

[3] Source is Fiscal Impact of Proposed Legislation for Measure HB 3099 – C prepared by Theresa McHugh. Note: only impacts on original or engrossed versions are considered official.

Appendix B. Tactics Alignment

The following pages show the mapping between the ETS Strategic Plan tactics for each goal and the goal's strategies and objectives. It also shows whether funding comes from operational or venture sources and dependencies between tactics.

Goal 1. Expand Statewide IT Services

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	1. Expand Statewide IT Services	Strategies					Objectives	
								Define new services	Identify and resource key services	Build or acquire new services	Operationalize new services	Identify and respond to new business opportunities	25% growth of statewide shared technology infrastructure	Statewide shared service applications serve 80% of state employees
1		1.1	**Implement new Backup Service offerings** – backup and restore capabilities for new and existing customers		11Q1 – 12Q4	Completed	X	X	X	X	X	X	X	
1		1.2	**Implement Service Portfolio Management** – methodology for identifying, developing and implementing new service offerings and receiving new customers		12Q1 – 13Q2	Completed	X				X	X		X
1	B	1.3	**Implement new Disaster Recovery Service offerings** – provide local and remote DR choices for existing and new customers		11Q1 – 15Q4	In Progress (70%)	X	X	X	X	X	X	X	
4	B	1.4	**Implement new Email Service offerings** – provide statewide email as a shared service available to all Agencies	1.5	11Q1 – 15Q4	On Hold (70%)	X		X	X	X	X	X	X
4	B	1.5	**Implement Integrated Active Directory Service offerings** – provide secure foundation to support shared services offerings		11Q1 – 15Q4	On Hold (90%)	X		X	X	X	X	X	X
		1.6	**Implement Application Service Provider (ASP) Business Model** – define and implement the ASP service including service catalog definitions and rate model			Cancelled								

Goal 1. Expand Statewide IT Services

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	1. Expand Statewide IT Services	Strategies					Objectives	
								Define new services	Identify and resource key services	Build or acquire new services	Operationalize new services	Identify and respond to new business opportunities	25% growth of statewide shared technology infrastructure	Statewide shared service applications serve 80% of state employees
1		1.7	**Define the architecture for DAS applications** – define business, data, and technology architectural components and relationships; determine opportunities for standardization and streamlining and improve impact analysis capabilities		12Q1 – 15Q4	Completed	X	X	X	X				X
		1.8	**Implement Broadband Cable Service** – provide cable signal delivered over the data network (e.g., viewing legislative sessions)			Cancelled								
	N	1.9	**Implement Disk and Tape Encryption Service** – provide disk and tape encryption capabilities to help meet regulatory and audit requirements			Not Funded	X	X	X	X	X	X	X	
	N	1.10	**Implement Long-Term Backup Service** – provide customers the ability to selectively move files to an archive storage tier with low usage/low media cost profile			Not Funded	X	X	X	X	X	X	X	
		1.11	**Implement IPv6 Network Service** – provide capabilities to exploit features of IPv6 network protocol (Content merged into Tactic 4.6 Technical Architecture)			Cancelled								
3		1.12	**Implement Technologies to Permit Mobile Access to Applications** – e.g., MS Office on Smartphones, expanded Citrix capabilities		13Q1 – 16Q4	Completed	X				X	X	X	X

Goal 1. Expand Statewide IT Services

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	1. Expand Statewide IT Services	Strategies					Objectives	
								Define new services	Identify and resource key services	Build or acquire new services	Operationalize new services	Identify and respond to new business opportunities	25% growth of statewide shared technology infrastructure	Statewide shared service applications serve 80% of state employees
	N	1.13	**Implement Virtual Desktop** – provide a solution for enterprise customers (support 20k customers) to enable consistent work tools while reducing support costs			Not Funded	X	X			X	X		X
		1.14	**Application Delivery to Any Customer –** Provide Application Delivery Services to any ETS customer in the shared application delivery platform or customer's environment			Cancelled	X	X		X	X	X	X	X

Goal 2. Support Customer Business Initiatives

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	2. Support Customer Business Initiatives	Strategies			Objectives	
								Understand and participate in customers' IT initiatives	Architect or Broker IT solutions	Staff and coordinate delivery teams	Solution alternatives documented and presented 100% of the time	Proposed solutions address critical business requirements 100% of the time
		2.1	**Implement enhanced customer business relationship model** – implement strategies to enhance alignment with Agency business such as concierge services and implement an ongoing Business Relationship Management program (Content merged into tactic 3.1 Customer Service Strategy)			Cancelled						
2		2.2	**Implement new solution proposal management process** – establish methodology for gathering customer requirements and architecting and pricing alternative solutions proposals		11Q1 – 13Q2	Completed	X	X	X		X	X
2		2.3	**Implement strategy for coordinated ETS support of business initiatives** – e.g., daily review at 8:35 meeting for BHIP and Orkids		13Q1 – 13Q2	Completed	X			X	X	X
1	N	2.4	**New Shared Application Platform –** Architect and implement a new Shared Application Platform for DAS Business Lines and for any ETS Customer		14Q3 – 16Q2	In Progress (25%)	X	X	X	X	X	X
2	O	2.5	**Web Enablement of Government Services –** Investigate and develop new opportunities for enabling government agency interaction with the public, and delivery of government services to Oregon citizens using web and mobile technologies		12Q1 – 16Q4	Ongoing	X	X	X	X	X	X

Goal 3. Provide Proactive Customer Service

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	3. Provide proactive customer service	Strategies				Objectives	
								Automate routine problem solving before customer is aware	Provide easy self-service options	Manage to specific service levels	Provide customer assistance for non-routine requests for problems	80% of routine problems are automatically resolved prior to customer awareness	Sustained 90% customer Satisfaction Rating
1	B	3.1	**Implement Customer Service Strategy** – define the Customer Service Ethic for the ETS organization; presales outreach; customer onboarding and retention; and customer service training for staff		12Q1 – 15Q4	In Progress (90%)	X			X	X		X
4	N	3.2	**Implement ETS Customer Service Portal** – provide improved tools and services (e.g., chat capability, ticket review, self-service options)		15Q1 – 16Q4	On Hold (0%)	X		X			X	X
	N	3.3	**Implement Centralized Log Management** – tools and processes that review and summarize SMF and other log records to support event, security, capacity, and configuration management			Not Funded	X	X				X	X
2	B	3.4	**Implement Storage Utilization Service** – enhance visibility of disk utilization for the ETS and its customers to assist with reporting, billing, and archiving/removing files		11Q1 – 15Q4	In Progress (15%)	X				X		X
2		3.5	**Implement Service Catalog Management** – restructure the service catalog to fit the full-cost maturity model and introduce lifecycle management for it		12Q1 – 13Q2	Completed	X			X			X

Goal 3. Provide Proactive Customer Service

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	3. Provide proactive customer service	Strategies				Objectives	
								Automate routine problem solving before customer is aware	Provide easy self-service options	Manage to specific service levels	Provide customer assistance for non-routine requests for problems	80% of routine problems are automatically resolved prior to customer awareness	Sustained 90% customer Satisfaction Rating
		3.6	**Implement Application Monitoring Service** – develop new service to monitor all components supporting a customer's application			Cancelled							
		3.7	**Implement Online Service Catalog** – provide service descriptions and costs based on full-cost maturity data, allowing customer to input requirements and generate an estimate for most services	3.2 3.5		Cancelled							
	N	3.8	**Implement Automated Capacity Management** – ensuring that the capacity of IT services and the IT infrastructure is able to deliver agreed service level targets in a cost-effective and timely manner; includes projecting capacity requirements, setting and monitoring thresholds, and trending usage.			Not Funded	X	X		X		X	X
	N	3.9	**Implement eDiscovery/Legal Hold Service** – self-service ability to search through any discoverable data and selectively place legal holds on that information			Not Funded	X		X				X
	N	3.10	**Implement and Automate Event Management** – coordinated monitoring and automatic responses to common events using a cross-platform dashboard	3.3		Not Funded	X	X				X	X

Goal 3. Provide Proactive Customer Service

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	3. Provide proactive customer service	Strategies				Objectives	
								Automate routine problem solving before customer is aware	Provide easy self-service options	Manage to specific service levels	Provide customer assistance for non-routine requests for problems	80% of routine problems are automatically resolved prior to customer awareness	Sustained 90% customer Satisfaction Rating
4	B	3.11	**Implement Automated Provisioning** – technician-driven or self-service tools that automate the process of provisioning standard infrastructure services (e.g., servers)	3.8 4.4 6.7	13Q3 – 16Q2	On Hold (10%)	X		X			X	X
		3.12	**Implement Knowledge Management** – tools and processes to capture information about service delivery procedures and ticket information and make it readily accessible (content merged into tactic 6.6 IT Service Management)			Cancelled	X				X	X	X

Goal 4. Optimize & Protect IT Resources

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	4. Optimize and protect IT resources	Strategies			Objectives		
								Architect for maximum delivery speed, agility, utilization, and reliability	Architect security environment to defined business requirements	Architect for customer choices	80% of standards servers delivered within 2 business days	100% of solutions engineered prior to handoff for delivery to business	80% of standard work delivered using agile structure and repeatable process
1		4.1	**Replace GTD5 Voice System** – Converge the old voice system with the data network to eliminate voice circuits; reduce cost; provide central management of voice service; and enhance the voice feature set available to customers		10Q1 – 12Q4	Completed	X	X	X				X
3	B	4.2	**Develop standards for operational work** – Standardize, document and automate where possible, procedures for all highly-repeatable or routine operational work and processes (e.g., provisioning process)		11Q1 – 16Q2	In Progress (70%)	X	X			X		X
1		4.3	**Develop technical standards** – determine and document standards for technical platforms (e.g., security for types of information and systems; application/database/computing standards)		11Q1 – 13Q2	Completed	X	X			X	X	X
1	B	4.4	**Implement Agile Architecture for Service Delivery** – Infrastructure and delivery methods that enable quick processing of service requests (e.g., centrally-managed, redundant firewalls, and simplified network with centralized management)	Bus. Case Approval	12Q1 – 16Q4	In Progress (15%)	X	X			X		X
	N	4.5	**Implement Deduplication for backup and primary storage** – reduce disk			Not Funded	X	X					X

Goal 4. Optimize & Protect IT Resources

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	4. Optimize and protect IT resources	Strategies			Objectives		
								Architect for maximum delivery speed, agility, utilization, and reliability	Architect security environment to defined business requirements	Architect for customer choices	80% of standards servers delivered within 2 business days	100% of solutions engineered prior to handoff for delivery to business	80% of standard work delivered using agile structure and repeatable process
			requirements and slow the storage growth rate by eliminating duplicated data										
1	B	4.6	**Create and Execute Technical Roadmap** – document and implement planned technology upgrades, acquisitions and standards for the next five years		12Q1 – 16Q4	Ongoing	X	X	X			X	X
		4.7	**Implement Configuration Management** – capability to maintain information about configuration items required for delivering an IT service, including their relationships (merged into tactic 6.6 IT Service Mgmt.)	3.3		Cancelled	X	X					X
1	N	4.8	**Implement Automated Storage Management** – provide efficiencies through automatic migration of data to the appropriate storage tier based on usage		13Q1 – 15Q4	In Progress (33%)	X	X					X
3	N	4.9	**Identify and Implement Software Consolidation for Shared Services** – e.g., mainframe emulation tool, standard desktop images		11Q1 – 16Q4	Ongoing	X	X					X
		4.10	**Implement workflow enhancements based on the new organization structure** – document service delivery workflow within new organization structure then apply LEAN techniques and automation to streamline service delivery	6.1		Cancelled							

Goal 4. Optimize & Protect IT Resources

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	4. Optimize and protect IT resources	Strategies			Objectives		
								Architect for maximum delivery speed, agility, utilization, and reliability	Architect security environment to defined business requirements	Architect for customer choices	80% of standards servers delivered within 2 business days	100% of solutions engineered prior to handoff for delivery to business	80% of standard work delivered using agile structure and repeatable process
3		4.11	**Roll out Voice over IP (VoIP) across the state** – build on the converged telecom environment by migrating customers to VoIP		10Q1 – 12Q4	Completed	X	X		X			X
1	B	4.12	**Reduce or retire the Automated Tape Library (ATL)** – replace the ATL with disk arrays		12Q1 – 15Q4	In Progress (90%)	X	X					X
4	B	4.13	**Rewrite DAS Legacy Applications –** Rewrite DAS legacy systems utilizing the new Shared Application Platform architecture to gain application performance improvements and future maintenance efficiencies. Identify opportunities for DAS application consolidation	2.4	14Q3 – 16Q4	In Progress (10%)	X	X	X	X			X
		4.14	**Centralized Licensing System Service –** Provide three avenues for agencies to replace their existing licensing systems with an electronic licensing web service. (Content merged into Tactic 2.5 Web Enablement of Government Services)			Cancelled							

Goal 5. Leverage Multi-Sourcing

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	5. Leverage multi-sourcing	Strategies				Objectives	
								Develop criteria to broker services	Maximize sourcing strategies to enable delivery	Architect to support and secure brokered services	Leverage new technologies and industry experts	Increased use of external providers facilitates 25% growth expectation	Services brokered to avoid staff overload when demand exceeds resources
1	O	5.1	**Broker Voice Services** – establish and transition to contracts with voice and network vendors to provide expanded managed services	Bus. Case Approval	12Q1 – 16Q2	In Progress (55%)	X	X					X
1		5.2	**Implement Multi-Sourcing options** – broker contracts for hardware and software capacity to host application needs (e.g., security log monitoring, voice services, software as a service for online time entry)		12Q1 – 14Q2	Completed	X			X			X
2	B	5.3	**Develop Multi-Sourcing Strategy** – define guidelines for when to source work internally and when to consider external sourcing (e.g., staff overload, time to respond, non-standard request, capacity shortages, skill shortages, cost)		13Q1 – 15Q4	In Progress (75%)	X		X				X
3	B	5.4	**Monitor, Maintain, and Support Strategic Sourcing Capabilities** – review services and delivery models to ensure that the most efficient and cost effective method of service delivery is achieved; internal and external providers will be evaluated (e.g., eGov, voice and data network services)		12Q1 – 16Q4	In Progress (25%)	X		X			X	
		5.5	**Implement Cloud Switching Service** – seamlessly and securely connect our network to a private or public cloud provider's network enabling mixes service delivery capabilities		15Q3 – 16Q4	Not Started	X	X	X	X	X		X

Goal 5. Leverage Multi-Sourcing

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	5. Leverage multi-sourcing	Strategies				Objectives	
								Develop criteria to broker services	Maximize sourcing strategies to enable delivery	Architect to support and secure brokered services	Leverage new technologies and industry experts	Increased use of external providers facilitates 25% growth expectation	Services brokered to avoid staff overload when demand exceeds resources
1		5.6	**Application Development Partnership –** Create a partnership (with intergovernmental agreements and processes) with Oregon Universities to help assist in the development of Applications for the State of Oregon. This will help college students gain experience while proving ETS staff augmentation when the demand is high		13Q4 – 15Q2	Completed	X		X		X	X	X

Goal 6. Maintain Competitive Business Model

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	**Status:** Not Started, In Progress (X%), Completed, Cancelled, Tabled, Undetermined, Ongoing, On Hold	6. Maintain competitive business model	Strategies				Objectives		
								Pursue flexible and efficient funding	Benchmark against competition	Implement a clear and efficient delivery organization	Implement rates so customer control costs via service choice	By 13/15 funding and rates align with Entrepreneurial Management	Benchmark reviews conducted annually	Accountability aligns to strategies at unit and individual level by 7/1/16
1		6.1	**Develop and implement an organization structure that supports Entrepreneurial Management (EM)** – identify roles, functional units, and reporting structure to best support strategic goals, outcomes, and customer service ethic; modify position descriptions as needed, reassign staff to new positions and cross train	3.1	11Q1 – 13Q2	Completed	X			X				X
1	N	6.2	**Implement employee time tracking** – support time collection to accurately determine the actual cost of service delivery		11Q1 – 16Q2	In progress (50%)	X			X				X
1	B	6.3	**Implement Organizational Change Management strategy** – build on organizational change methods to shift to the EM model; includes implementing skill-based staffing plan for new organization		13Q1 – 16Q4	In progress (5%)	X			X				X
		6.4	**Develop strategy for benchmarking** – define scope and guidelines for periodic comparison to external benchmarks (e.g., rates, brokering, ITSM, environmental scans)			Cancelled								
		6.5	**Develop and implement funding strategy that supports the EM business model** – seek change to non-limited budget and funding for ventures outside of rates			Cancelled	X	X				X		

Goal 6. Maintain Competitive Business Model

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	**Status:** Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	6. Maintain competitive business model	Strategies				Objectives		
								Pursue flexible and efficient funding	Benchmark against competition	Implement a clear and efficient delivery organization	Implement rates so customer control costs via service choice	By 13/15 funding and rates align with Entrepreneurial Management	Benchmark reviews conducted annually	Accountability aligns to strategies at unit and individual level by 7/1/16
2	B	6.6	**Continuous implementation of priority IT Service Management processes based on IT Infrastructure Library (ITIL)** – determine biennial priorities and target maturity levels; track progress against targets; define and track process metrics		11Q1 – 16Q4	Ongoing	X		X	X			X	X
	N	6.7	**Implement billing system enhancements** – support full cost maturity services; streamline and automate billing support processes for midrange, storage and self-provisioning			Not Funded	X				X	X		
		6.8	**Implement Service Improvement Program** – formalize methods, tools, and mindset to support regular discussion on common cause issues to develop solutions and closed loop corrective actions; continually engage staff in identifying areas where resource and work optimization can occur (Content merged into tactic 6.6 IT Service Management)	6.1		Cancelled	X			X				X
1	B	6.9	**Develop and implement plans to merge ETS into the office of the State CIO -** Develop business and strategic plans that align with the SCIO's strategic plan, the Stage Gate Process and other SCIO services. Identify roles, functional units and reporting structure to best support strategic goals and		15Q1 – 16Q4	In Progress (10%)	X			X				X

Goal 6. Maintain Competitive Business Model

Priority	Funding: Base using LAB Limitation (B), Not Funded (N) or Other (O)	Goal.Tactic	Tactic and Description	Depends on to finish	Timeline	Status: Not Started In Progress (X%) Completed Cancelled Tabled Undetermined Ongoing On Hold	6. Maintain competitive business model	Strategies				Objectives		
								Pursue flexible and efficient funding	Benchmark against competition	Implement a clear and efficient delivery organization	Implement rates so customer control costs via service choice	By 13/15 funding and rates align with Entrepreneurial Management	Benchmark reviews conducted annually	Accountability aligns to strategies at unit and individual level by 7/1/16
			desired outcomes with minimum interruption to delivery and support of services; Modify position descriptions as needed, reassign staff to new positions and cross train.											
1	B	6.10	**Develop a strategy and plan to implement clear structures around workforce management, workforce development and position management** - Development of an engaged and productive workforce directly supports the ongoing stability and performance of the IT service organization to support increased customer demand. This business process improvement initiative is to analyze and refine ETS processes to ensure ETS is doing business effectively, efficiently as possible, and enable the organization to achieve its strategic goals.		15Q1 – 16Q4	In Progress (50%)	X			X				X


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