



Information Technology Services Strategy Plan

Oregon Liquor and Cannabis Commission

June 2025

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Information Services Strategic Overview

Information Technology Vision and Mission

The Vision and Mission statements defined in conjunction with IT leadership underpin the desired IT Target State

Vision

We empower departments with reliable insights and smooth operations. As trusted advisors, we strengthen relationships, prioritize customer service, and embrace innovation to drive efficiency, progress, trust and collaboration.

“The ‘North Star’ for the IT organization”

“Guides the day-to-day activities and decisions for the IT organization”

Mission

Through teamwork, collaboration, and a commitment to improvement, we provide secure, efficient, and innovative technology solutions that support the agency's goals. We deliver mission-driven services while upholding fiscal responsibility, public safety, and accessibility for Oregonians.

Information Technology Strategic Objectives

The Strategic Objectives have been defined in alignment with OLCC's broader business goals and priorities

Strategic Objective	Description
 Workforce Empowerment	<ul style="list-style-type: none">• Promote a desirable work environment through professional development, inclusion, succession and career planning.• Foster a culture to attract, nurture and retain an engaged and skillful IT workforce. Foster a professional growth mindset.• Invest in professional development for resources within IT organization.• Create an environment where people are empowered to make decisions with minimal leadership oversight.
 Stakeholder Relationship Improvement	<ul style="list-style-type: none">• Incorporate best practices and technologies to create exceptional value and customer satisfaction.• Ensure that IT services and digital products are accessible to all customers.
 IT Operational Excellence	<ul style="list-style-type: none">• Identify opportunities to digitize and/or automate and streamline processes and ensure excellence in service delivery through seamless user experience.• Provide leadership in Technology innovation to advance organizational goals, initiatives and outcomes.• Leverage IT's capabilities and processes to continuously improve operational posture and resilience.
 Infrastructure and Systems Modernization	<ul style="list-style-type: none">• Modernize OLCC's portfolio of legacy systems and technology infrastructure to reduce technical debt and drive better business alignment.• Advance process maturity in intake/portfolio management to help balance resource demand and supply.
 Compliance with Legislative Mandates	<ul style="list-style-type: none">• Ensure that any new or existing technology can address legislative mandates for compliance.• Support business process improvement, risk reduction, and IT service performance through the adoption of targeted and relevant technology innovations.

Information Technology Guiding Principle

The defined strategic guiding principles are meant to advise the IT organization on the boundaries of the IT Strategy

Principle Name	Principle Statement
1 Enterprise value focus	We aim to provide maximum long-term benefits to the enterprise by eliminating technical debt through enterprise modernization.
2 Fit for purpose	We maintain capability levels and create solutions that are fit for purpose without over engineering them.
3 Simplicity	Through enterprise modernization, the OLCC aims to reduce the number of applications supported and to move to an enterprise architecture.
4 Managed security	We aim to improve our security posture by filling vacant security positions and improving enterprise-wide compliance with the state's security policies.
5 Managed data	We handle data creation, modification, and use enterprise-wide in compliance with our data governance policy and consistent with Oregon's Open Data Program.
6 Controlled technical diversity	We embrace the state's cloud forward approach to maintaining applications and platforms.
7 Innovation	We seek to share what's available in technology innovation with business to help inform business decisions and streamline processes.
8 Compliance to laws and regulations	We operate in compliance with all applicable laws and regulations.
9 Reuse > buy > build	We prefer to buy existing best of breed solutions that are established, tested, and successful, reusing systems, where applicable. Internal development is a possibility, however, a last resort.
10 Customer centricity	We strive to understand the business needs and objectives in order to deliver useful tools to enhance business.

Information Technology Organization Maturity Target

IT leadership aspires to achieve “Organizational Partner” maturity through effective technology enablement and strategic support to business



► *Reliable Technology Innovation to help business expand or discover new “growth” opportunities*

► *Effective Execution on Business Projects, Strategic Use of Analytics and Customer Facing Technology*

► *Effective fulfilment of business work orders / requests and reliable service management practices.*

► *Stable IT Infrastructure and systems and Frontline / Service Desk support*

► *Inability to provide reliable support to Business stakeholders*

Current State Findings



Agency Drivers – Information Technology Strategic Plan

The primary objective of the IT Strategic Plan is to facilitate effective technology enablement in alignment with OLCC’s Vision, Mission and Values

OLCC Agency Vision

To be recognized as a model in management and regulation of alcohol and cannabis, with measurable success in reducing harm, fostering responsible business practices, and supporting economic development.

OLCC Agency Mission

OLCC oversees access to alcohol and cannabis products in Oregon through education, regulation, and distilled spirits distribution. Our aim is to protect public health and safety while supporting responsible businesses and providing funding for local and state agencies.

OLCC Agency Priorities

Efficient, Modernized Operations & Outcomes

Fulfill current commitments and address opportunities to upgrade and improve our operations and services, while strengthening teamwork and clarifying the value of our work.

Balance Regulation, Compliance, Enforcement and Education in Public Safety

Assess and take action to ensure proper balance across the array of methods we use to ensure alcohol and cannabis providers are operating legally and equitably. Strengthen efforts to promote and protect public health and safety.

Positive Business Environment

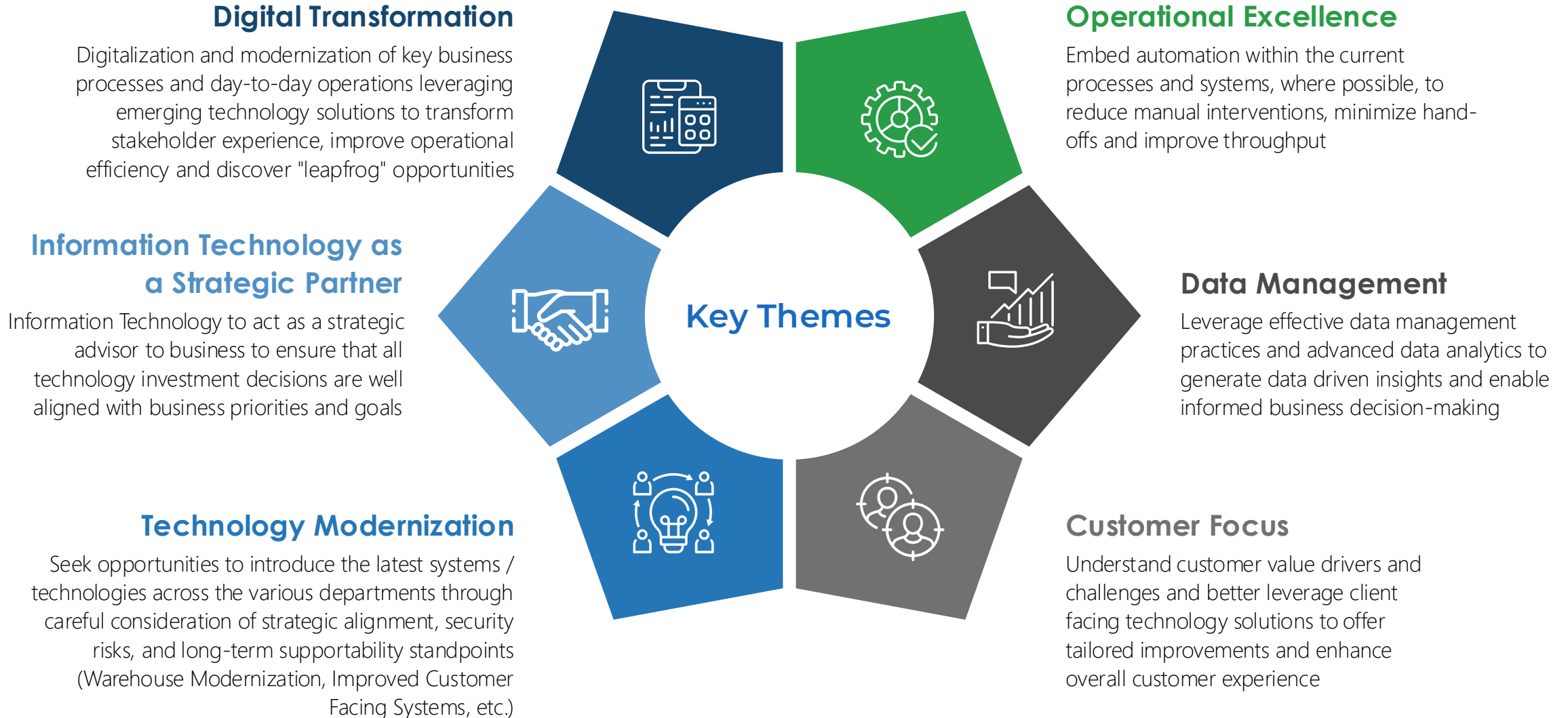
Ensure our licensing, regulation and distilled spirits distribution activities create conditions for success across Oregon’s responsibly-run alcohol, cannabis and related service industries.

Equity and Inclusion: Commitment and Action

Identify opportunities, develop and implement strategies to foster diversity and belonging in our organization and across the industries we serve and regulate.

Key Themes – Stakeholder Interviews

Agency Executive Leadership were interviewed to determine their key priorities and implications for IT organization



Organizational Context – SWOT Analysis

Strengths (Internal)

- Recognition that there is a need for realignment and revision of vision and strategy.
- There is a lot of effort and initiative to improve.
- Diversity in experience and expertise
- Enthusiasm for accomplishment of OLCC's goals
- Adaptability of the organization and nimbleness to adjust to changing laws.
- The People and their eagerness to contribute and educate.
- Achieving Compliance of licensed businesses through education and enforcement activities.
- Teamwork, OLCC's IT team is happy to step in and help each other out.
- As the third largest revenue generating agency, OLCC has a reliable source of funding which can provide financial stability for long-term projects and initiatives. Also dedicated bond funds for modernization projects.
- OLCC staff have a strong history of collaboration and data sharing between government agencies and departments to improve service delivery.

Weakness (Internal)

- Big appetite / lack of focus / fragmented
- Potential lack of clarity on organizational data needs and use cases
- Single points of failure
- Limited resources
- Groups and department divided or siloed
- Current outdated technology in the warehouse is a major threat to daily operations.
- Staff turnover and retention lead to loss of historical knowledge.
- Capacity of staff to continue daily duties as well as contribute and participate on project teams.
- State government often operates under intense public scrutiny, making it difficult to manage public perception in the event of IT failures or security breaches.
- The public sector can be burdened with process, which can slow down decision-making, procurement, and project implementation.
- Budget limitations can restrict the ability to invest in modern technology, infrastructure upgrades, and talent acquisition.

Organizational Context – SWOT Analysis

Opportunities (External)

- The move to cloud computing creates more opportunities for remote work.
- Investing in technology that makes staff more mobile.
- Lessons learned from projects to make sure we're communicating often and gathering stakeholder feedback.
- Legislative changes can provide process improvement and improved customer service.
- Special interest groups can provide insight into process improvement.
- The opportunity to lead digital transformation initiatives that improve government services, streamline processes, and enhance citizen engagement through modern technology.
- Learn from new hires and different experiences of team members
- Complete CAMP project by implementing Phase 4
- Looking for improvements when HQ and Warehouse moves occur.
- Improved data analytics with implementation of PowerBI
- Potential for better business insights and decisions with modernized systems

Threats (External)

- Technical debt continues to increase; rapid advancements in technology can make existing systems and practices obsolete, requiring significant investments in modernization to stay competitive.
- Dependence on external technology vendors and service providers can expose the department to risks associated with vendor stability, performance, or contractual disputes.
- Cyber threats, including hacking, ransomware attacks, and data breaches, pose a significant risk to the security of government systems and data.
- The agency is always subject to the needs of the legislature and special interest groups.
- Not having standardized processes and formalized policies documented and stored in a centralized location creates gaps in knowledge sharing and enforcement.
- The ability to quickly address needs when the warehouse is located in a separate city from Headquarters office.
- Service or power outages caused by inclement weather

Organizational Context – PESTLE Analysis

Political

- Any legislative change ('Federal' or 'State') that will significantly impact OLCC's day-to-day operations.
- Inter-government relations are important to OLCC's ability to carry out our mission. These include local government, tribal relations, legislature and other state agencies.
- OLCC Commissioner and external stakeholder (including special interest groups) needs or demands are taken into consideration.
- As a public entity, the agency frequently looks for stakeholder engagement. We have prioritized stakeholder engagement on the three major projects: Relocation, CAMP, and DSSC.
- OLCC HQ, Milport Warehouse, and McLoughlin Warehouse will relocate in 2025.

Economic

- Although OLCC is the third largest revenue generating agency in the state, OLCC's budget is set by the legislature. This requires forethought by OLCC to request budget in the form of Policy Option Packages (POPs).
- In addition to the legislatively approved budget, OLCC has also been granted some bond funding for its large-scale projects: Relocation, Conveyance, CAMP and DSSC.
- The state of Oregon has a competitive compensation package including hourly wage, retirement, healthcare, and vacation/sick leave.
- Since the inception of the projects (pre-pandemic) the Relocation and DSSC projects have been affected by inflation, supply chain issues and shortages of resources. The rise in prices and scarcity of materials has increased budgets and elongated schedules, resulting in reduced scope for the Relocation project.

Social

- The demographics of OLCC's customers vary greatly across the alcohol and cannabis industries. These include a wide range of income levels, education levels, technology proficiency, and age. While majority of customers have been identified as Caucasian, with English as a first language, Oregon has a significant population whose native language is Spanish and or Mandarin. Majority of Oregon's population lives in the Willamette Valley.
- As OLCC embarks on the Modernization projects, it is important that CAMP accommodate both Spanish and Simple Chinese written language to serve customers.
- Through the Privilege Tax project, the attitude of OLCC's customers has been primarily a "What's in it for me?" (WIIFM) approach. Engaging with stakeholders through Organizational Change Management (OCM) is identifying the needs of each stakeholder group.
- In the IT department, there is traditionally low turnover. Many staff have been employed by OLCC for 5+ years. However, there have been new positions and promotions that have created openings.
- Remote work is challenging for ensuring engagement and connection among staff.

Organizational Context – PESTLE Analysis (Cont'd)

Legal

- OLCC is updating IT policies and implementing standardization for process documentation.
- OLCC employees are represented by AFSCME and as such, the union is viewed as a partner. Union views and input are taken into consideration.
- The open data project has cast a light on all agencies' availability of data. OLCC has also made data available and accessible to the public and are continually looking for opportunities to share data.
- The OLCC operates within a highly regulated environment. Any law changes may significantly impact OLCC's day-to-day operations.

Environmental

- Oregonians pride themselves on being environmentally friendly. As stewards of the public's trust, we try to implement environmentally sustainable practices. Mandates include Energy Trust of Oregon best practices and standards, as well as DAS policies.
- Environmental factors that affect business continuity include forest fires during the summer, rockslides during the rainy season, and the occasional snow or ice storm in the winter.
- Weather can impact the ability to ship and receive from the Warehouse. Poor air quality or road conditions can make it difficult for employees to work or for employees or trucking companies to access the building.

Technological

- The OLCC has decades of technical debt. As a result, both staff and customers have an interest in updating technology and implementing innovative tools.
- Implementing the State's Cloud Forward approach, OLCC is examining Azure for cloud compute and storage. Additionally, new technologies are often preferred to be cloud-hosted. EIS has expressed cloud hosted in GCC or on prem is the most compliant.
- OLCC issues devices, iPhones, and laptops to employees. Use of outside laptops or phones is not allowed.
- Most of the current development work is to maintain decades-old legacy systems. However, some will move to configuration with the future state systems.
- As OLCC relocates the warehouse to Canby, there will be new infrastructure to be stood up in the new server room as well as switches, A/V, etc. around the facility
- Internet access in Rural Oregon has always been a concern for OLCC. With the advancements in technology, we are hopeful that services like Starlink will help all Oregonians access online services.
- OLCC IT is engaging with Communications to use the agency's social media channels to communicate with stakeholders for Relocation, CAMP, and DSSC.
- OLCC is compliant with Criminal Justice Information Services (CJIS) data standards and the storage of Personally Identifiable Information (PII) data.

Key Considerations to inform PESTLE Analysis

For each prompt below, always try to answer the question: how does this affect my business?

Political	<ul style="list-style-type: none">• Will a change in government (at any level) affect your organization?• Do inter-government or trade relations affect you?• Are there shareholder needs or demands that must be considered?	<ul style="list-style-type: none">• How are your costs changing (moving off-shore, fluctuations in markets, etc.)?• Do currency fluctuations have an effect on your business?• Can you attract and pay for top-quality talent (e.g. desirable location, reasonable cost of living, changes to insurance requirements)?	Economic
Social	<ul style="list-style-type: none">• What are the demographics of your customers and/or employees?• What are the attitudes of your customers and/or staff (do they require social media, collaboration, transparency of costs, etc.)?• What is the general lifecycle of an employee (i.e. is there high turnover)?• Is there a market of qualified staff?• Is your business seasonal?	<ul style="list-style-type: none">• Do you require constant technology upgrades (faster network, new hardware, etc.)?• What is the appetite for innovation within your industry/business?• Are there demands for increasing data storage, quality, BI, etc.?• Are you looking at cloud technologies?• What is the stance on bring your own device?• Are you required to do a significant amount of development work in-house?	Technological
Legal	<ul style="list-style-type: none">• Are there changes to trade laws?• Are there changes to regulatory requirements, e.g. data storage policies or privacy policies?• Are there union factors that must be considered?	<ul style="list-style-type: none">• Is there a push towards being environmentally friendly?• Does the weather have any effect on your business (hurricanes, flooding, etc.)?	Environmental

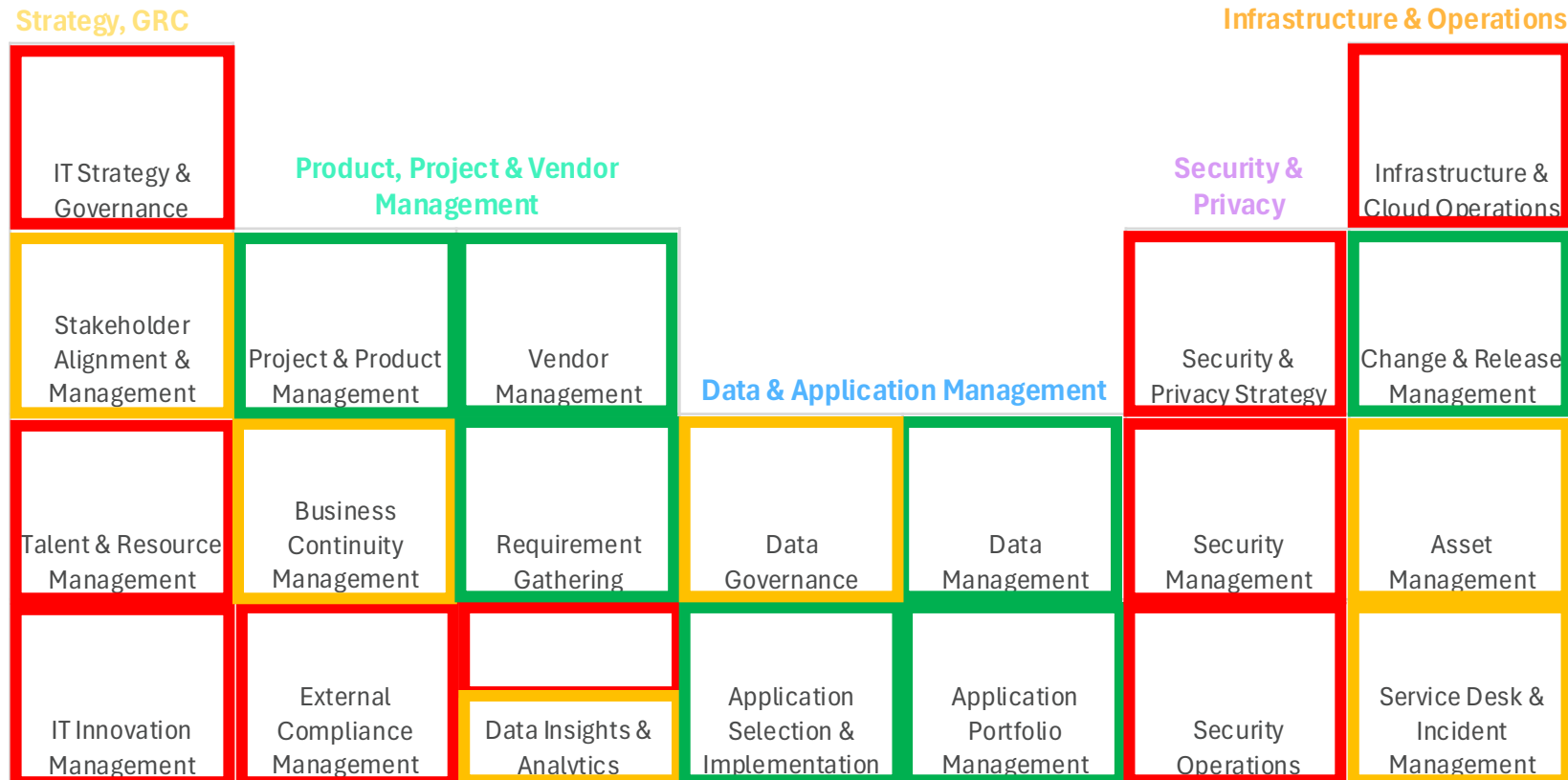
Instruction: Color / Mark each service based on its maturity in your organization.

Low Maturity: Red (✖),

Medium Maturity: Amber ⦿ ,

High Maturity: Green (✓)

Small IT Management & Governance Framework



Current Challenges for Information Technology (IT) organization

Key Current State Observations

1 Improve Security Posture

Focus on implementing strong security controls, conducting regular assessments, educating employees, and addressing third-party risks

2 Decisions are not Data-Driven

Limited use of analytics and lack of data centric mindset to leverage data driven insights and make informed business or operational decisions.

3 High Technical Debt

Warehouse infrastructure relies on several outdated legacy systems, resulting in heavy technical debt and high operational risk.

4 Limited Resource Capacity

Limited bench-strength and increasing workload have necessitated IT resources working on both "Keep the Lights On" initiatives and multiple projects at the same time.

5 Knowledge Retention

Staff turnover and heavy reliance on vendors / service providers may result in knowledge retention risk and knowledge silos.

Key Implications

- Storage is not scalable with limited security and audit trails to track document updates
- Decisions may at times result in initiatives that are not completely aligned with the foundational business objectives
- High risk to business-as-usual operations and risk of non-compliance
- Limited capacity and inadequate time for IT resources to invest effort into large scale enterprise modernization initiatives
- Knowledge is susceptible to being lost when people leave the organization
- Lack of standardization for IT practices and procedures due to reliance on legacy knowledge

Proposed Go-Forward Focus Areas for Information Technology

1

Information Technology Modernization

Enable modernization of existing IT infrastructure and systems to better support the business capabilities while addressing security alignment and ongoing support and sustainment.

2

Greater Business-IT Alignment

Define the necessary process and cadence to better understand business processes, priorities, and technology needs and identify opportunities to improve process efficiency and technology enablement.

3

Enhance Security Posture

Focus on implementing strong security controls, conducting regular assessments, educating employees, and addressing third-party risks

4

Digital Accessibility

Ensure all necessary websites, systems and relevant record data / information are accessible to internal as well as external stakeholders from anywhere at anytime.

5

Data-driven Decision-Making

Define data strategy and formulate data governance for the mission critical datasets to ensure improved data quality and enable timely data access to organizational leadership for informed decision-making.

Key Focus Areas

Maximizing process efficiency and delivering rapid business value



Recommendations and Roadmap

Business Goals Mapped to IT Strategic Objectives

Business Goals Agency

Strategic Plan

Achieved
through

Business Initiatives



Top IT Initiatives (2025-28)

Achieved
Through

IT Strategic Objectives (2025-28)

OLCC Priorities	Stakeholder Inputs	Stakeholder Inputs	IT Objectives
Efficient, Modernized Operations & Outcomes.	<ul style="list-style-type: none">Complete physical infrastructure/relocation projects on time, on budget, and with documented success measures.Build out and transition all distilled spirits distribution to the new Canby warehouse by the end of Q2 2026.	<ul style="list-style-type: none">IT infrastructure implementation in new Canby Warehouse (Modernizing Physical Infrastructure)Conveyance system implementation in new Canby WarehouseAzure Cloud-Hosted, Managed Services	Infrastructure and Systems Modernization
Efficient, Modernized Operations & Outcomes.	<ul style="list-style-type: none">Fully modernize critical operating systems, dramatically reducing manual and paper-based activities, streamlining processes and supporting a culture of data.	<ul style="list-style-type: none">Business Process ImprovementsData Governance, Data Strategy and ManagementData Analytics EnablementAzure Cloud-Hosted, Managed ServicesDistilled Spirits Supply Chain (DSSC) systems implementationCannabis & Alcohol Management Program (CAMP) system implementation programITSM Platform Replacement (Team Dynamix)	Infrastructure and Systems Modernization
Efficient, Modernized Operations & Outcomes.	<ul style="list-style-type: none">Restore/enhance cross-agency communication, personal connections and shared engagement in our mission.	<ul style="list-style-type: none">Document Management and ArchivingBusiness Process ImprovementsChange Advisory Board (CAB) process improvements (OLCC project intake)Governance Improvements	Stakeholder Relationship Improvement
Balance Regulation, Compliance, Enforcement and Education in Public Safety	<ul style="list-style-type: none">Resolve ambiguity and reduce complexity in our regulatory framework to enhance fairness, equity and transparency.Update resources—especially on-line tools—to improve clarity and accessibility of information on existing regulation and pending changes.	<ul style="list-style-type: none">Improving External Customer Service (Call Center)Business Process ImprovementsTechnology alignment with new and changing laws	Infrastructure and Systems Modernization

Business Goals Mapped to IT Strategic Objectives (cont'd)

Business Goals

*Achieved
through*

Business Initiatives



Top IT Initiatives (2025-28)

*Achieved
Through*

IT Strategic Objectives (2025-28)

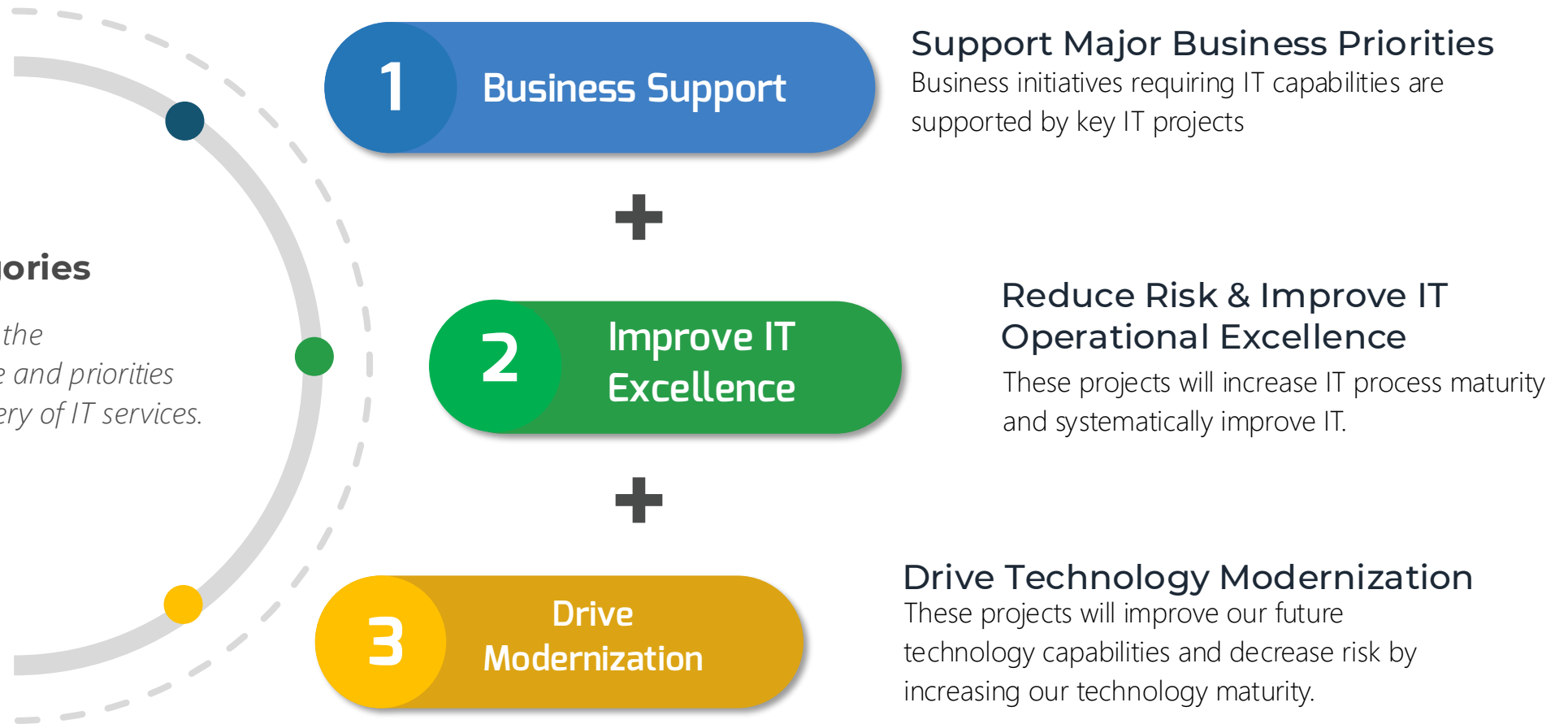
OLCC Priorities	Stakeholder Inputs	Stakeholder Inputs	IT Objectives
Positive Business Environment	<ul style="list-style-type: none"> Improve licensing processes to eliminate unnecessary burden on applicants, increase efficiency and reduce wait-times. OLCC will be available to serve customers. 	<ul style="list-style-type: none"> Improving External Customer Service (Call Center) Business Process Improvements Technology alignment with new and changing laws Distilled Spirits Supply Chain (DSSC) systems implementation Cannabis & Alcohol Management Program (CAMP) system implementation program Change Advisory Board (CAB) process improvements (OLCC project intake) Governance Improvements 	<p>Infrastructure and Systems Modernization</p> <p>Stakeholder Relationship Improvement</p> <p>Compliance with Legislative Mandates</p>
Equity and Inclusion: Commitment and Action	<ul style="list-style-type: none"> Nurture an inclusive workplace culture that promotes equitable management/HR practices and where everyone feels comfortable to be their authentic selves. Provide the tools and training required to ensure staff succeed with their assigned tasks 	<ul style="list-style-type: none"> Knowledge Base and Standardized Processes (Service Catalog) Review and refresh - IT security Review and refresh - IT training ITSM Platform Replacement (Team Dynamix) 	<p>Workforce Empowerment</p> <p>IT Operational Excellence</p>
Equity and Inclusion: Commitment and Action	<ul style="list-style-type: none"> Promote equitable access to services, programs, and resources for alcohol, cannabis, and partner businesses. Establish criteria and process for marijuana license reassignment that offer opportunities for qualified members of underserved communities and those historically affected by cannabis criminalization. Assess the Liquor Store Operation application and temporary assignment processes for equitable opportunities. 	<ul style="list-style-type: none"> Improving External Customer Service (Call Center) Cannabis & Alcohol Management Program (CAMP) system implementation program Technology alignment with new and changing laws Business Process Improvements Data Analytics Enablement 	<p>IT Operational Excellence</p> <p>Workforce Empowerment</p> <p>Stakeholder Relationship Improvement</p> <p>Compliance with Legislative Mandates</p>

IT will deliver on its mission through several key initiatives

*Today's Technology Leadership teams typically have three key mandates:
Support the Enterprise, Run an Effective IT shop, and Drive/Support Modernization*

Initiative Categories

To collectively support the organization's purpose and priorities and improve the delivery of IT services.



COMPLETE

It will deliver on 5 in-flight, planned, and new key initiatives directly supporting key organization business requirements

1

Business Support Initiatives / Projects

Business - Supporting IT Initiatives/Projects

- ✓ Improving External Customer Service (Call Center)
 - ✓ Business Process Improvements
 - ✓ Data Governance, Data Strategy and Management
 - ✓ Data Analytics Enablement
 - ✓ Technology alignment with new and changing laws
-

Key Initiative Roadmap

1

Business Support

[illegible]

IT identified 6 in-flight, planned or new initiatives for improving IT Operational Excellence

2

Improve IT Operational Excellence

IT Operational Excellence Initiatives:

- ✓ Optimizing Identity and Access Control
 - ✓ Knowledge Base and Standardized Processes (Service Catalog)
 - ✓ Review and refresh - IT security
 - ✓ Review and refresh - IT training
 - ✓ Change Advisory Board (CAB) process improvements (OLCC project intake)
 - ✓ Governance Improvements
-

Key Initiative Roadmap

Improve IT Operational Excellence

[illegible]

IT will deliver on 7 in-flight, planned, and new key initiatives to drive technology modernization enablement across OLCC

Modernization Initiatives:

3

Drive Modernization

- 
- ✓ Distilled Spirits Supply Chain (DSSC) systems implementation
 - ✓ Cannabis & Alcohol Management Program (CAMP) system implementation program
 - ✓ IT infrastructure implementation in new Canby Warehouse (Modernizing Physical Infrastructure)
 - ✓ Conveyance system implementation in new Canby Warehouse
 - ✓ Document Management and Archiving
 - ✓ Azure Cloud-Hosted, Managed Services
 - ✓ ITSM Platform Replacement (Team Dynamix)
-

Key Initiative Roadmap

3

Drive Modernization

[illegible]

Significant Planned IT Investments by 2027

IT leadership has planned for major technological advancements across OLCC and has developed preliminary budget estimates for a subset of the key initiatives included in the IT Strategic Plan

Key Initiative	Budget Estimate
DSSC Systems Implementation Program	\$29,846,457
CAMP Software Implementation Program	\$10,254,400
Canby Warehouse IT Infrastructure	\$500,000
Canby Warehouse Conveyance	\$15,000,000

IT will establish and report on key metrics to demonstrate progress towards defined objectives

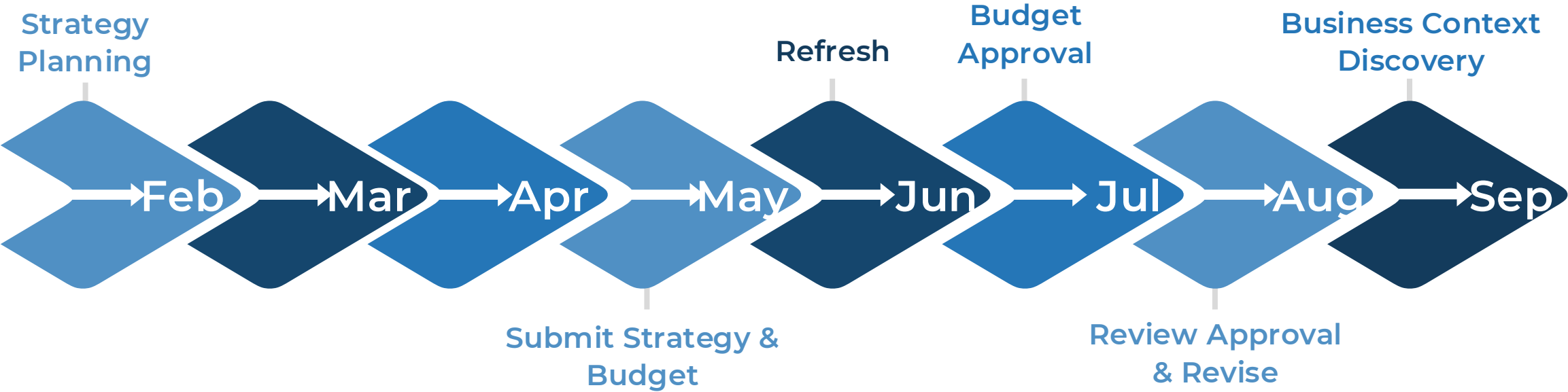
Strategic Objective	Metrics	Target	Current Baseline
 Workforce Empowerment	<ul style="list-style-type: none"> Team member Engagement 	<ul style="list-style-type: none"> Target Engagement Mean is 4.0 	<ul style="list-style-type: none"> Current Engagement Mean Comparison for IT is 3.85
 Stakeholder Relationship Improvement	<ul style="list-style-type: none"> Card payments for liquor licenses Customer satisfaction rating for cannabis license applications 	<ul style="list-style-type: none"> Increase card payments for liquor licenses and compliance activity by 80% upon completion of CAMP project. Improve customer satisfaction by 20% 	<ul style="list-style-type: none"> Currently there is no option for licensees to pay for compliance fines or liquor license fees 47% for timeliness of services (current customer satisfaction rating)
 IT Operational Excellence	<ul style="list-style-type: none"> Replace segregated systems 	<ul style="list-style-type: none"> Replace at least 30 existing segregated systems that will be combined into a single DSSC solution 	<ul style="list-style-type: none"> 45 siloed systems currently make up the functionality of the Distilled Spirits Supply Chain
 Infrastructure and Systems Modernization	<ul style="list-style-type: none"> Decrease system down-time 	<ul style="list-style-type: none"> System(s) down-time will be decreased by 75% from current down-time rate 	<ul style="list-style-type: none"> System(s) currently experience significant break downs an average of once every two weeks requiring manual intervention.
 Compliance with Legislative Mandates	<ul style="list-style-type: none"> Compliance investigation time 	<ul style="list-style-type: none"> Reduce investigation time by 30% of hours per FTE 	<ul style="list-style-type: none"> Simple investigations take an average of 5 days; complex investigations may take up to 45 days.

**IT Strategy
Refresh Plan &
Communication
Plan**



IT Strategy Refresh Plan

Review the IT strategy on a periodic basis to make proactive changes to the business strategy or direction.



FREQUENCY	AUDIENCE	SCOPE	DATE
ANNUALLY	Organization's stakeholders, IT Leadership Team	<ul style="list-style-type: none">• Re-survey• Review / validate strategy• Update to schedule/initiatives	Pre-Budget <ul style="list-style-type: none">• February (1 week)• May (2 days) Post-Budget <ul style="list-style-type: none">• July (1/2 day)
EVERY YEAR	IT Leadership Team	<ul style="list-style-type: none">• Initiative's status updates• Organization updates• New projects• Risks / constraints• Changes in priorities• Updates	<ul style="list-style-type: none">• February through June• 4 hours per month
REFRESH (Review and Revise)	IT Leadership Team	<ul style="list-style-type: none">• Full Strategy Planning• Incorporate Capital and Operating budget estimates into the Plan	<ul style="list-style-type: none">• June (1/2 day)

Information Technology is dedicated to frequent touch points throughout the year to ensure the strategy team and all stakeholders are on the same page about any changes or updates regarding strategic initiatives.

IT Strategy – RACI Matrix

The defined IT strategy needs to be reviewed, adjusted, communicated and supported collectively by IT and Agency leadership for currency and relevance.

High Level Activities	CIO	IT Leadership	Business Teams	ISS 8 (Sr. IT Staff)	ALL IT Staff	Executive Team	Commissioners	EIS
Business Needs and Feedbacks – Agency Specific	R	A, R	C	R	R	I	I	I
Developing the IT Strategic plans – Agency Specific	A, R	R	C	R	C	C	I	I
Executing the IT Strategic plan – Agency Specific	C	A	C, I	R	R	R	I	I
Common Frameworks (ideation to implementations)	R	A	N/A	R	R	I	N/A	I
Monitoring & Reporting - Agency Level	C	A, R	I	C	R	I	N/A	I
Communication and Awareness of Strategies – Agency Level	R	A, R	I	R, C	R, C	R	I	I
Refreshing the Strategies – Agency Level	A, R	R	C, I	R	C	C	I	I

R – Responsible, A – Accountable, C – Consulted, I - Informed









Communication Plan: IT Strategy

The defined IT Strategy needs to be communicated to the Executive leadership and all required stakeholders in a timely manner to ensure necessary stakeholder buy-ins and effective execution and adoption of the strategy.

Communication Activity	Target Audience	Person Responsible	Communication Mode	Key Points (Communication Content)	Timing
IT Strategy Presentation	Executive Team	IT leadership	In person meeting	<ul style="list-style-type: none">IT Vision, Mission, Strategic Objectives and Guiding PrinciplesIT Roadmap	Quarterly
	EIS	IT leadership	In person meeting	<ul style="list-style-type: none">IT Vision, Mission, Strategic Objectives and Guiding PrinciplesIT Roadmap	Annually
	Commissioners	IT leadership	In person meeting	<ul style="list-style-type: none">IT Vision, Mission, Strategic Objectives and Guiding PrinciplesIT Roadmap	Annually
IT Strategy Summary	Business Teams	IT leadership	In person meeting	<ul style="list-style-type: none">IT Roadmap and any key implications to the concerned business groups / teams	Annually
	ISS 8 (Sr. IT Staff)	IT leadership	In person meeting	<ul style="list-style-type: none">IT Vision, Mission, Strategic Objectives and Guiding PrinciplesIT Roadmap	Monthly
	All IT Staff	IT leadership	Email / Website	<ul style="list-style-type: none">IT Vision, Mission, Strategic Objectives and Guiding PrinciplesIT Roadmap	Quarterly

Key risks that might impact the defined IT strategy

The risks and mitigation needs to be factored into the IT Strategy formulation early on for successful execution.

Risk #	Risk Description	Probability	Impact	Risk Mitigation Plan	Timing
1	Delays in contracting			<ul style="list-style-type: none">Factor vendor dependency into project timelinesEngage as early as possible, with clear scope & definition of deliverablesWork closely with contractors to identify gaps that may require amendment(s)	As Needed
2	New Legislative Mandates			<ul style="list-style-type: none">Define process / cadence and relationship with Legislative office to solicit any updates / changes to mandatesEnsure legislative team input is a key interface into project lifecycle	Annual during legislative session
3	IT staff turnover			<ul style="list-style-type: none">Well organized and structured KnowledgebaseImproved design/code standards/annotation and Code Repository	Ongoing
4	Insufficient capacity to complete key initiatives			<ul style="list-style-type: none">Hiring new IT Staff to offset retirements and/or attrition	As Needed

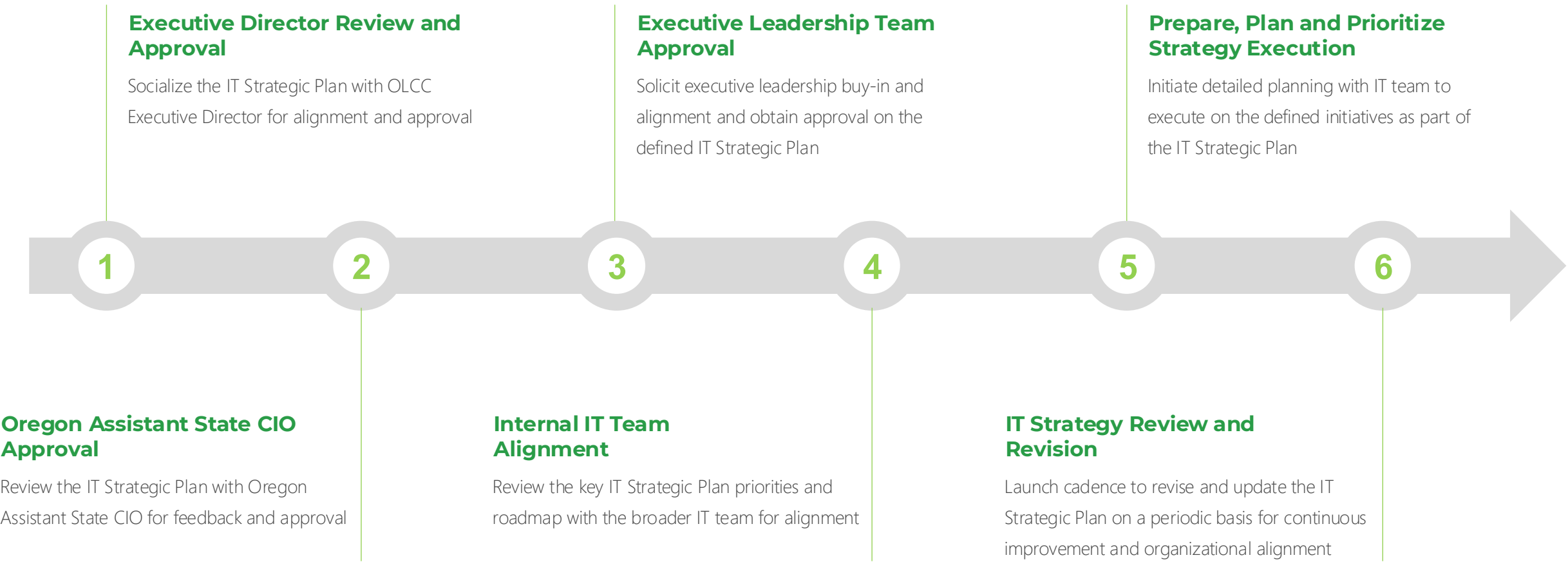
 High

 Medium

 Low

NEXT STEPS

A number of short-to-medium term actions have been identified by IT leadership to operationalize the IT Strategic Plan



Appendix-I: Initiative Profiles



1. Implement CAMP Online Applications

Create online applications and training for all marijuana and alcohol related licensing roles.

Incremental Cost:

\$2.5 M

LABOR

\$10.2 M

SYSTEMS

\$1.7 M

CONTRACTS

\$14.3 M

TOTAL

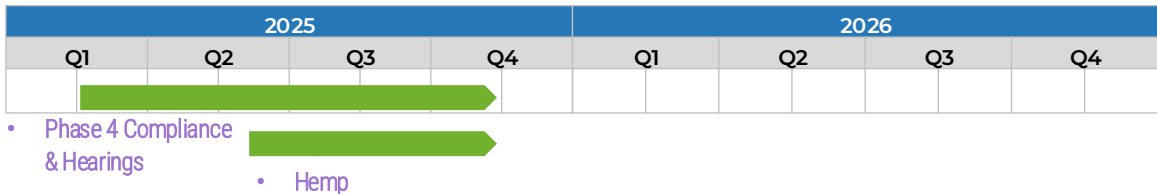
CIO comments:

This solution allows for more automated workflow, increased data accuracy, renewal tracking, as well as online payments from applicants. The CAMP solution is implemented using a modern .Net framework.

Initiative Description:

- IT will work with the OLCC business process owners and contractor to streamline the application process and provide all necessary training in an online format.. The project will include a GAP Analysis, requirements definition, development, and UAT phase of the project. Lastly, the system will be hosted and supported by the contractor for five years after “Go Live” date.

Project Timeline:



Primary Business Benefits:

▼

Reduce time and effort to submit and receive approval for applicants

Other Expected Business Benefits:

▼

Reduce time to process applications, more efficient due to automated workflow

▼

Reduce time to process applications, more efficient due to automated workflow

▲

New features such as automated renewal notice and tracking and online payments

03

Drive Modernization

Risks:

- New system and change in business practices.
- Large organizational change and the way OLCC does business. Online applications and payments are new manners of doing business.
- Training internal staff and external customers for new system
- Allows for OLCC staff to work remotely, not located in same office.

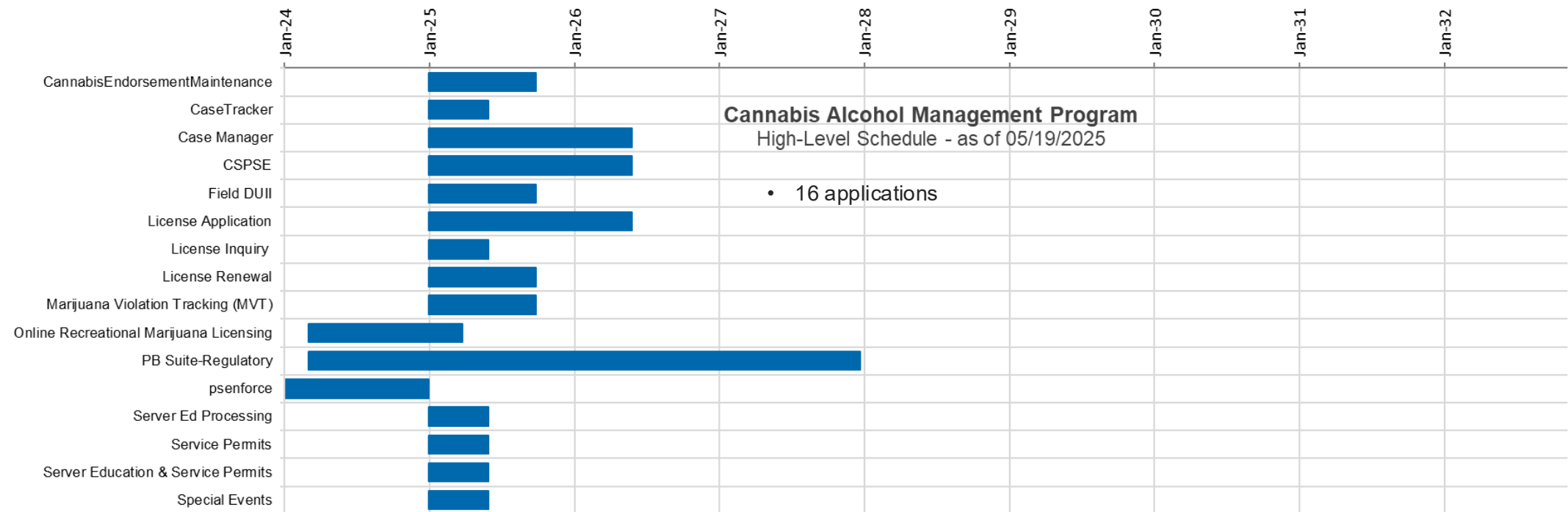
Dependencies:

- System will be hosted in cloud environment and connectivity will be critical.
- There are integrations with Department of Justice, DSSC, and Cannabis Tracking System.

Project Team

- Business Sponsor: Rich Evans
- IT Sponsor: Christie Scott
- PM: Patrick Classen

Applications being migrated to CAMP



2. DSSC: New WMS, POS, ordering and inventory software

Modernize inventory, ordering, and Point of Sale systems to provide integration and real-time data to OLCC Executive Team.

Incremental Cost:

\$3.4 M

LABOR

\$36 M

SYSTEMS

\$2.6 M

CONTRACTS

\$42 M

TOTAL

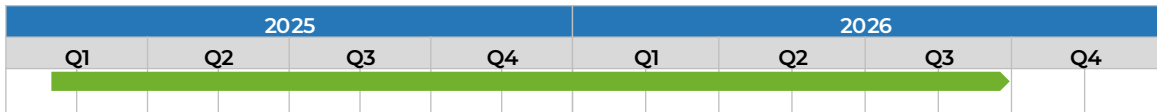
CIO comments:

“This project will be implemented in conjunction with the new Canby warehouse. In addition to modern and reliable software for finance and warehouse operations, we will also implement an enterprise POS system for all liquor stores.”

Initiative Description:

- IT will implement a new Warehouse Management System (WMS), Point of Sale system for all liquor stores, and a new ordering software system. These systems will be integrated and provide real-time reporting and accessible online for all OLCC staff. These systems will allow each department to run their own unique and custom reports to enable decision making.

Project Timeline:



Primary Business Benefits:



Improve system reliability and system uptime for the warehouse.

Other Expected Business Benefits:



Improved inventory and order management for retail business.



Automated payments to liquor agents and treasury reducing payment errors.



Increased efficiency for staff by consolidating more than 40 stand alone applications



Risks:

- Unconventional architecture results in unknown processes
- Solution vendor’s ability to adequately inform and document OLCC the architectural needs and project roadmap
- All systems must integrate with each other and new conveyance
- POS system must be accepted and installed in each Liquor Store throughout the State of Oregon
- OLCC staff need training for new systems and new processes

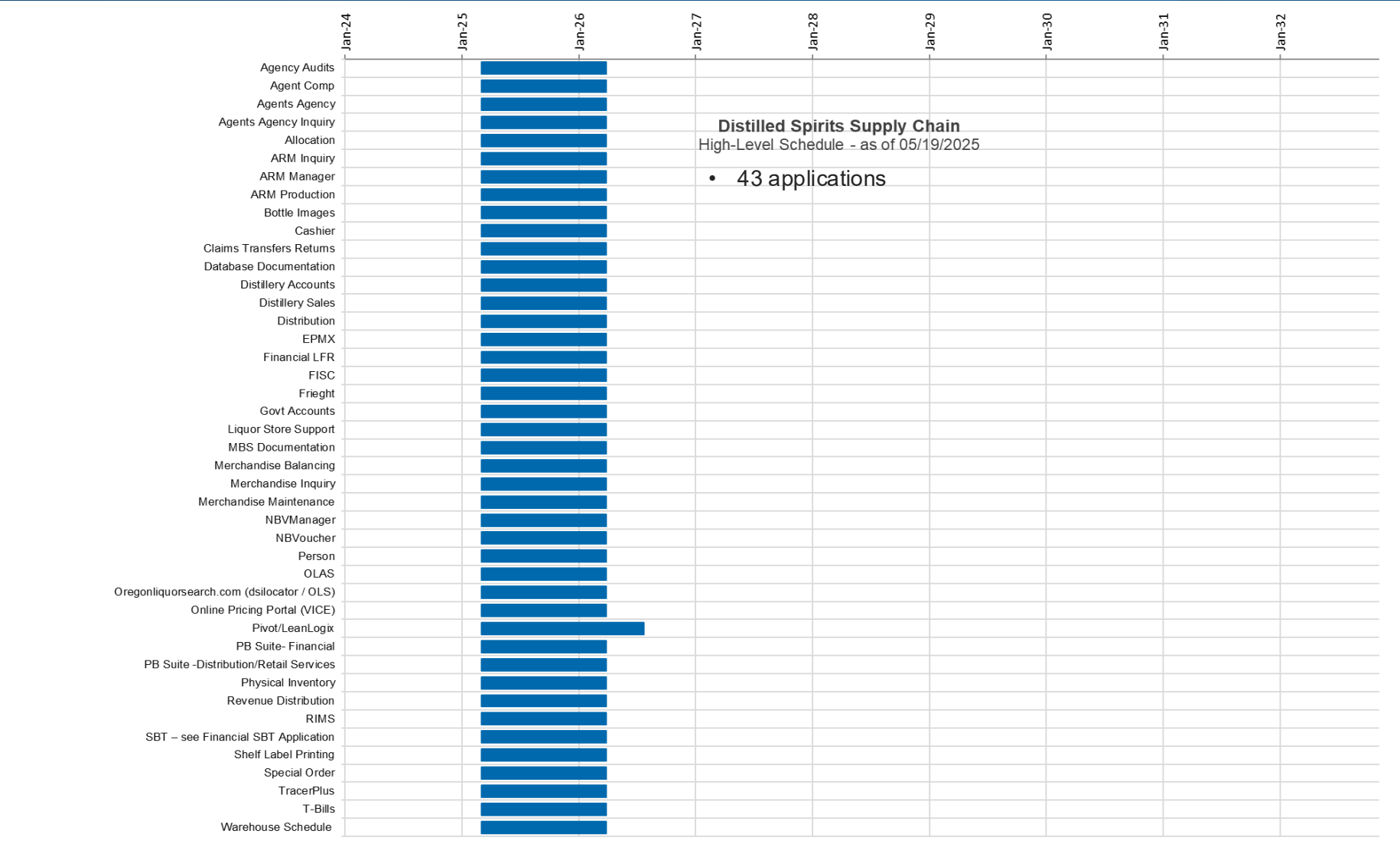
Dependencies:

- Solution is hosted on Azure state government tenant
- Existing Warehouse will be completed first
- New Warehouse will be implemented when it is online
- Policy that all liquor stores using new POS system must be approved
- Conveyor systems must be installed first.

Project Team

- Business Sponsor: Leisa Bertram
- IT Sponsor: Christie Scott
- PM: Daniel Shaw, Connie Yaeger

Applications being migrated to DSSC



3. IT infrastructure in new Canby Warehouse

Implement IT infrastructure in Canby to support larger OLCC operations, inventory, and delivery of distilled spirits.

Incremental Cost:

\$500 K

CONSTRUCTION

\$236 K

LABOR

TBD

CONTRACTS

\$736 K

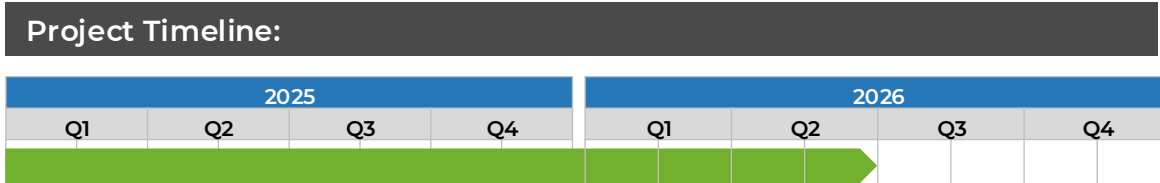
TOTAL

CIO comments:

"The need for upgraded infrastructure is paramount at the new location to support business throughout the next 20 years. By investing in modern technology and architecture, it reduces the risk of replacement as systems age out."

Initiative Description:

- Our new warehouse will provide the space we need and room for expected growth for the next 30 years. Both additional space for product, modern loading techniques, and expanded shipping capacity. Modern technology infrastructure is needed to support business for the next 2-3 decades.




Primary Business Benefits:




Upgrade older hardware and software for reliable shipping, receiving

Other Expected Business Benefits:



Secure tools to enable business to conduct meetings, access state network and agency document storage.



More reliable technology to prevent outages, data corruption, and hardware failure.

Initiative Category:

03

Drive Modernization

Risks:

- Infrastructure staff will be housed at the Canby Warehouse to monitor new systems
- Must have all digital systems (access, security, video, and IT) installed and integrated.

Dependencies:

- Must implement cooperatively with Enterprise Information Services to ensure connectivity and security protocols.

Project Team

- Executive Sponsor: Christie Scott
- Business Owner: Leisa Bertram
- IT Sponsor: Christie Scott

4. Conveyance in New Canby Warehouse

Implement conveyance software and integrate with DSSC.

Incremental Cost:

\$432 K

LABOR

\$15 M

SYSTEMS

TBD

CONTRACTS

\$15.4 M

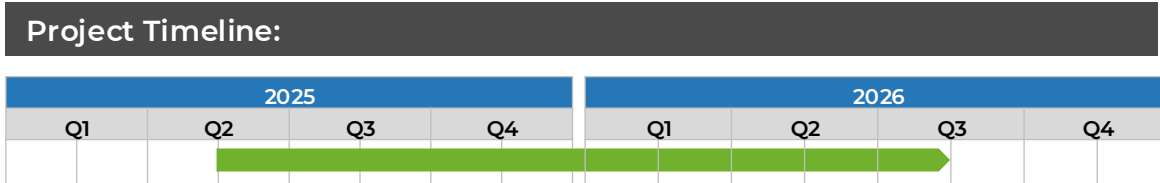
TOTAL

CIO comments:


“The conveyance is the cardiovascular system of warehouse operations. Having a strong foundation, tested integrations, and a sound contract for maintenance and support will set OLCC on the right path for years to come.”

Initiative Description:

- OLCC is installing a new conveyance system in our Warehouse. The system includes software that operates the conveyance which will be integrated into the DSSC project. The solution will be hosted by OLCC either on premises (at OLCC warehouse), hosted by DCS, cloud or bare metal.




Primary Business Benefits:



Install a new, modern conveyor system with integrations to DSSC software

Other Expected Business Benefits:



More reliable systems that will be fully integrated and supported



Faster through put for the distribution center

Initiative Category:

03

Drive Modernization

Risks:

- DAS procurement services has determined that a direct award for the Maintenance and Support contract is not viable. Agency must go out for bid.
- Agency will be pursuing a service contract to ensure proper maintenance, security patches and updates to the proprietary software.
- Ensuring proper security controls are in place

Dependencies:

- Conveyor system must integrate with DSSC hardware.
- Warehouse design must be in tandem with the Conveyance build-out.
- pursuing a service contract to ensure proper maintenance, security patches and updates to the system.
- Must create a plan with DAS/EIS on how/where to host the conveyance solution

Project Team

- Executive Sponsor: Christie Scott
- Business Owner: Leisa Bertram
- IT Sponsor: Christie Scott

5. Implement IT Service Management Best Practices

Activities performed by IT to design, build, deliver, operate and control IT services offered to customers.

Incremental Cost:

\$8,000

LABOR

\$10,000

SYSTEMS

\$0

CONTRACTS

\$18,000

TOTAL

CIO comments:

"This capability is a result of our ongoing commitment to innovation initiatives."

Initiative Description:

- Document all the processes and activities to design, create, deliver, and support IT services to OLCC staff.
- Configure TeamDynamix ITIL software for incident management, asset tracking, self service portal, knowledge base, and project management.

Project Timeline:

2025				2026			
Q1	Q2	Q3	Q4	5Q1	Q2	Q3	Q4
					<div></div>		

Primary Business Benefits:

Improved customer satisfaction with IT

Improve internal processes

Other Expected Business Benefits:

Better customer experiences

Reduce costs

Initiative Category:

03

Innovation

Risks:

- Consistent adoption across all OLCC business units
- Document all IT Services and business processes can be time-consuming

Dependencies:

- None

Project Team

- Business Sponsor: Christie Scott
- IT Sponsor: Michael Callaghan
- PM: Daniel Shaw



Appendix III: Engagement Summary

Engagement Overview

Background:

In 2024, Oregon Liquor and Cannabis Commission (OLCC) sought the assistance of Info-Tech Consulting as an independent advisor to assist in formulating a broad IT strategy for the enterprise to ensure better business-alignment and a go-forward action plan / roadmap to enable Information Technology (IT) to efficiently support the business counterparts going forward and help the business realize the defined business goals / priorities. In 2025, the OLCC revamped the IT strategic plan to align with the agency's new 2025 strategic plan.

IT Solution:

1. **Validate Business Context:** Engage with OLCC leadership to understand business goals and priorities, evaluate gaps and pain points and determine IT implications.
2. **Assess Current State Environment:** Identify the relative maturity of the different IT capabilities and governance to support business needs and aspirations.
3. **Formulate Recommendations:** Define a set of actionable recommendations to improve overall business-IT alignment while focusing on longer-term value creation.
4. **Prioritize and Plan Execution:** Develop a target state roadmap and define the necessary refresh plan to monitor and sustain the roadmap and ensure relevance and currency going forward.

Key Outcomes:



1. Business-aligned IT strategy to support the needs and priorities of the business stakeholders / core consumers of IT services

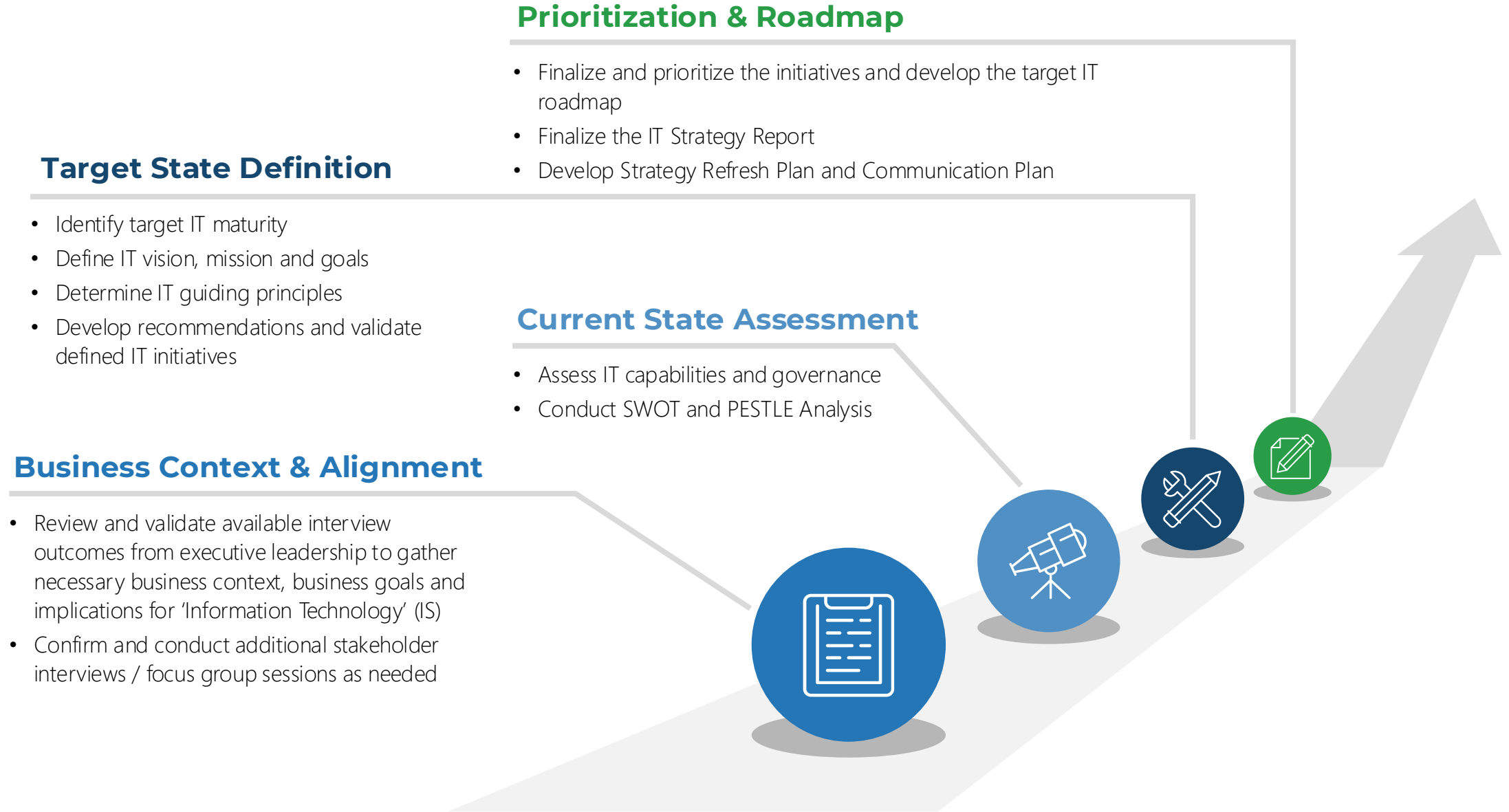


2. Defined go-forward plan to refresh and refine the IT Strategy to better address evolving needs of business stakeholders



3. A clearly defined path of action for the defined IT initiatives based on stakeholder priorities and organizational alignment

Engagement Approach Overview





Thank You