



Enterprise Architecture CPIC Review – Lessons Learned

July 20, 2005





EA Critical Partner Review

Challenge: Integrating EA review within overall HHS CPIC budget cycle

CPIC Office schedule:

- April 8 – deadline for Stage 1 Budget Submissions
- HHS EA Critical Partner Review requested for completion by April 29
- May 23 – HHS Critical Partner Review announcement sent out including OMB rating
 - ❖ **CPIC Critical Partners plan and set up reviews**
 - ❖ **Requested to complete initial review week of June 8-June 17**
 - ❖ **Request EA to complete OMB rating review**

HHS Enterprise Architecture Office schedule:

- Late March/early April:
 - ❖ Requested to plan EA Review
 - ❖ Created special HHS EA Reviewer form
 - ❖ Set up reviewers in special portfolios
 - ❖ Identified and oriented reviewers; Created and sent out EA Review Instructions
- April: All Stage 1 reviews completed between April 18-29
- May:
 - ❖ Notified OPDIVs of “Conditionally Recommended” and “Not Recommended” Investments and investments lacking Mapping to Reference Models to Update ProSight
 - ❖ Assisted Investment managers in resolving issues
 - ❖ **EA Re-review of Denied and Conditional Investments completed by May 29**
- June:
 - ❖ **Complete OMB rating**



CPIC Critical Partner Review Schedule

Start	End	Action
June 6	June 6	Take a snapshot of the PMT database for use in initial portfolio analysis; restrict database revisions to responses to Quality Review comments only [HHS OCIO].
June 6	June 17	Conduct Critical Partner and OMB 10 Reviews [Critical Partner reviewers/OMB 10 Reviewers/HHS OCIO]
June 20	June 24	Enter corrections to investment data [CPIC Managers] and rescore [Critical Partners and OMB 10 Reviewers]
June 27	July 29	Lock down PMT database to prevent changes during final HHS IT portfolio prioritization [HHS OCIO]
June 27	July 1	Finalize the FY2007 HHS IT Prioritized Portfolio [HHS OCIO/ITIRB]
July 5	July 29	Support Secretary's Budget Council (SBC) Meetings [HHS OCIO]



CPIC Review – Challenges

- HHS EA Office had limited info re Critical Partner Review process
- Many Departmental EA reviewers lacked ProSight navigation skills (“trained” but not active users)
- ProSight didn’t always function correctly (empty files because of failure to load properly)
- Incomplete information regarding status of investments (had they been updated or were these pulled in from prior year with no change yet?) – problem because of early-stage reviewer status
- Changing portfolios required juggling reviewers and reviews
- Lack of time to “debug” reviewer form
- Lack of “sight” into Investments at a level sufficient to complete a meaningful evaluation



CPIC EA Review: What worked

- CPIC staff were VERY helpful
 - Setting up new reviewer forms
 - Setting up users and review portfolios
 - Responding to “bug” notifications re untested form
- HHS EA PMO assigned “lead” to manage the process
 - Developed our own Instruction Manual
 - Served as remote “help desk”
 - Diverted problems from CPIC office
 - Managed re-reviews, changes to portfolios
- OPDIV EA Reviewers: **THEY WERE FANTASTIC!**; “
 - Learned the ropes” on the fly
 - Completed reviews quickly
 - Worked with Investment Managers to “fix” insufficiencies
 - Willingly took on additional or changed review assignments
 - Admitted they thought the process was VERY BENEFICIAL – cross Investment and cross-OPDIV insight
 - They want to do MORE and BETTER EA REVIEWS NEXT YEAR!



CPIC EA Review: What could be better

- Earlier dissemination of CPIC Cycle info to HHS EA CPIC team
- Better tie-in of EA with overall cycle to assure consistency
- Sufficient lead time to develop and test review forms and instructions
- Clearer status of investments (Has data been changed, updated? Or is this just imported from prior year?)