

# State of Oregon Enterprise Information Technology Planning

Contractor: PlanGraphics, Inc.

Contract: #57723

## **STATEMENT OF WORK:**

The Contractor shall provide expertise and services for the State's Enterprise IT Planning effort as described in the tasks below:

### **Task #1: Project Management**

Consultant will assign a Project Manager to provide leadership and oversight for all work, weekly status reports, and change management.

#### **Project Management Tasks**

The Consultant's Project Manager will:

- Contact State with instructions/checklists to prepare for the planning process and facilitated focus group sessions.
- Develop a detailed Project Work Plan and Schedule for review and approval by the State's Project Manager. The Work Plan and Schedule will detail the Consultant's tasks and deliverables, identify key milestone dates, clearly identify and explain all responsibilities of State personnel and provide an expected schedule of completion. The work plan will also include a plan/process for managing changes to the scope of work.
- Oversee any required vendor Change Management process.
- Provide written status reports and meet (by phone or in person) with the State's Project Manager weekly, or as required, to review the progress against the Project Work Plan and Schedule.
- Be available to State at all times to address any issues.

### **Task #2 : High Level Documentation Review**

Immediately upon contract execution, Consultant shall examine and gain an understanding of the following key project documents, to be provided by State:

- Current State of Oregon Enterprise Information Technology Strategy Document (including appendices)
- Executive Order 98-05
- Executive Order 99-05
- DAS/IRMD Secretary of State Audit (Sections relating to the State of Oregon Enterprise Information Technology Strategy Document)
- Minutes of the EIM Sub-Committee to date
- Business Drivers Document
- IT Issues Document
- ORS 291.038
- HB 3372
- HB 3399
- GIS Strategic Plan
- CJIS Strategic Plan
- E-Government Project Documentation
- Governor's IT Roundtable Charter and meeting minutes
- IT Roundtable Sub-Committee documents (Standards, etc)
- State's IT Policies
- COBIT (Control Objectives for Information Technology) Strategic Planning Objectives (at minimum PO 1.3)

### **Task #3 : Planning Coordination/Preparation Session with EIM Strategic Planning Committee**

Consultant shall conduct a planning coordination/preparation session with the EIM Strategic Planning Committee. The purpose of this session is to review the checklists (and associated documents/information/materials) referred to in TASK #1 above to ensure that the contractor and the State are properly prepared to hold the facilitated focus group sessions

# State of Oregon

## Enterprise Information Technology Planning

### **Task #4 : Focus Group Sessions**

Consultant must produce a Focus Group Plan that outlines the structure of the focus groups, specifies the target audience, discusses the facilitation strategy for each target audience, and includes the focus groups agenda. Consultant shall be required to provide the Focus Group Plan to State for review and approval before use.

Consultant shall then conduct facilitated focus group sessions, not to exceed the number of sessions identified in the RFP, each dealing with one strategic issue as defined by the Strategic Planning Committee. The meetings are to be open discussions that attempt to reach consensus on an approach or strategy to address each issue. The outcome of the concurrent meetings will be a document that describes the strategy or approach developed by the Focus Groups for each issue, and any relevant explanatory or background material. The total number of focus group sessions and the order in which they will be conducted will be determined following the completion of Task # 3 above.

Consultant shall provide four facilitators or facilitation teams. The Consultant must analyze and compile the focus group results and provide a report that summarizes the responses to each agenda item for the focus group discussions.

### **Task #5 – Recommendations on future course of Action**

Consultant shall make recommendations on future courses of action the State might take to address business drivers, IT issues, and outcomes of the Focus Group sessions. These recommendations will form the foundation for the revision of the State's Enterprise Information Technology Strategy.

### **Task #6 –Strategic Plan Final Draft Review**

Consultant will review/analyze the final draft of the State's Enterprise Information Technology Strategic Plan and verify/validate that:

- The plan meets the relevant requirements set forth in EO 98-05 and 99-05,
- The plan addresses the findings identified in the SOS audit.
- The plan meets requirements set forth in COBIT objective PO 1.3 and other relevant portions of COBIT relating to strategic plan development.
- The plan addresses the risks/challenges the state faces as well as the benefits inherent in conducting Information Technology work as an enterprise.
- Detailed strategies and tactics are tied to the business objectives of the overall plan.
- Appropriate assignment of duties and responsibilities in the plan have been made and that appropriate timelines for action have been set.
- Funding of enterprise initiatives is appropriately addressed and
- An action plan for creating detailed project plans for each planned initiative is included in the final Strategic-planning document.

### **Consultant Requirements**

In addition to the tasks and deliverables listed above, the Consultant must:

- Report any problems and/or issues and recommended solutions as they occur, or are identified.
- Communicate (via e-mail, phone, and in person) as necessary to ensure timely and adequate communications between the contractor, project teams, and other identified stakeholders.
- Provide knowledge transfer and mentoring to State project manager, Strategic Planning Committee, Enterprise Information Management Sub-Committee, and other identified stakeholders.
- Ensure the deliverables described above are approved and accepted by the State.
- Ensure the timelines set forth in their work plan can be met.
- Deliver project deliverables on time as described in the deliverable due dates above.

When the State declines to accept deliverables, the consultant will be required to make required changes to deliverables within three (3) business days after State acceptance was declined. The consultant will be required to ensure that all changes reference the task and be documented in the delivery schedule.

# State of Oregon

## Enterprise Information Technology Planning

### State Requirements

The following requirements will apply to the State. The State must reasonably provide the following to the Consultant:

- access to key resources and personnel
- access to other specified resources
- access to meeting facilities when appropriate
- access to management and end user work groups

The State will provide weekly status report format to Consultant.

The State will review status report and send Consultant written authority to post report on project web site.

The State must provide the Consultant with those documents required to accomplish the contractor's assign tasks.

The State will conduct an acceptance and approval process at the end of each major deliverable. The State has a maximum of three (3) business days for review and acceptance.