May 2, 2012

MEMORANDUM FOR FEDERAL AGENCY CHIEF INFORMATION OFFICERS

FROM: Steven VanRoekel
          Federal Chief Information Officer

SUBJECT: Increasing Shared Approaches to Information Technology Services

This memorandum provides Federal Agencies with policy guidance and management tools to use in increasing shared approaches to information technology (IT) service delivery across mission, support, and commodity areas. Taking a shared approach will:

- Improve return on investment across the Agency's entire IT portfolio through the coordinated use of TechStat program reviews[1]; PortfolioStat investment reviews[2]; and the consolidation of commodity IT systems, services, and related contracts[3] as described in the *Information Technology Shared Services Strategy* that accompanies this memo.

- Close productivity gaps by implementing integrated governance processes and innovative IT service solutions at the program, bureau and agency levels. Agency implementation is to be consistent with guidance contained in the *Federal Cloud Computing Strategy[4]* and *Digital Government Strategy[5]*, as well as the *Common Approach to Federal Enterprise Architecture* (Common Approach) that accompanies this memo. The Common Approach provides agile, standardized methods and tools for designing the next generation of IT resources and shared services that Federal Agencies will need to successfully accomplish their missions in the face of tight resources and rising customer needs.

- Increase communications with stakeholders as shared service managing partners, customers, and providers work together to ensure transparency, accountability, and ongoing collaboration in the full lifecycle of intra- and inter-agency IT shared service activities. Collaboration resources that are available to support this are CIO.gov, ITDashboard.gov, Performance.gov, and BusinessUSA.gov.

To ensure that IT shared services are implemented in a coordinated and expedited manner, Federal Agency Chief Information Officers (CIOs) will submit an "Enterprise Roadmap" to OMB by August 31, 2012 that covers Fiscal Years (FY) 2012-2015 and includes:

(1) Business and Technology Architecture: a high-level, integrated description of the agency's business objectives and enabling IT capabilities across all operating units and program areas - using enterprise architecture concepts and methods from the Common Approach to describe the agency-wide current architecture, future architecture, and transition plans. The transition plan will include a description of the two IT areas that Federal Agencies will migrate to a shared service model by December 31, 2012 in accordance with OMB guidance.

(2) IT Asset Inventory (Appendix 1): a list of IT assets agency-wide to include all IT systems[6] and services that support mission, administrative, and commodity IT programs, using the Federal

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[1] OMB Memorandum M-10-31; *Immediate Review of Information Technology Projects*, July 28, 2010.
[2] OMB Memorandum M-12-10; *Implementing PortfolioStat*, March 30, 2012.
[3] OMB Memorandum M-11-29; *Chief Information Officer Authorities*, August 8, 2012.
[4] *Federal Cloud Computing Strategy*; OMB, February 8, 2011. http://www.cio.gov/documents/federal-cloud-computing-strategy.pdf
[5] *Building a 21st Century Digital Government*; Federal CIO, FOSE Conference, Washington, D.C., April 3, 2012.
[6] The word definitions for "information technology" and "information technology system" can be found in OMB Circular A-11, July 2011.

Enterprise Architecture Reference Model taxonomies provided in the Common Approach. For the August 2012 Enterprise Roadmap submission, this IT Asset Inventory is optional but highly recommended. The IT Asset Inventory will be required for Enterprise Roadmaps thereafter.

(3) Commodity IT Consolidation Plan (Appendix 2): a synopsis of the agency-wide IT investment portfolio review conducted annually using methods and tools provided in OMB M-12-10. For the August 2012 submission, Federal Agencies will include their final plan to consolidate commodity IT, as is required by OMB M-12-10.

(4) Line of Business Service Plan (Appendix 3): the Program Manager of each Federal-wide Line of Business[7] will submit a Plan to OMB via the Managing Partner agency's CIO that addresses increasing the quality and update of the IT shared services that are provided through that LOB by the end of FY 2013. The LOB Plan will follow guidance provided in the IT Reform Agenda's 25-Point Plan[8] and the IT Shared Services Strategy document that accompanies this memo.

Going forward, Federal Agency CIOs will submit an updated Enterprise Roadmap to OMB by April 1st each year. OMB will provide information sessions for Agencies and LOB Managing Partners for the development of the 2012 Enterprise Roadmap on a monthly basis from May to August, 2012. For Enterprise Roadmap submission beginning with April 1, 2013, the following additional appendix will be included:

(5) IT Shared Service Plan (Appendix 4): a description, list, and transition plan for all intra- and inter-agency IT shared services that the agency intends to provide or consume during FY 2012-2015.

For questions regarding this memo, please contact Scott Bernard at egov@omb.eop.gov with "IT Shared Services" as the subject line.

Attachments:
1. Information Technology Shared Services Strategy
2. Common Approach to Federal Enterprise Architecture

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[7] OMB Memorandum M-04-08; *Maximizing Use of SmartBuy and Avoiding Duplication of Agency Activities with the President's E-Gov Initiatives*, February 25, 2004. Note: The list of Presidential E-Government Initiatives and Lines of Business were established by M-04-08 and is periodically updated by OMB. Current LOBs include: Human Resources, Geospatial Systems, Information Systems Security, Financial Management (including Grants Management), Performance Management, Federal Health Architecture, and Budget Formulation and Execution.
[8] *25 Point Plan to Reform Information Technology Management*, OMB, December 9, 2010.
http://www.cio.gov/documents/25-Point-Implementation-Plan-to-Reform-Federal%20IT.pdf