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RELEASE 4 (FOUNDATIONAL ALIGNMENT & INFRASTRUCTURE DATA) UPDATE

THINGS NOT GOING QUITE AS PLANNED (MARY WAS OVERLY AMBITIOUS)

I anticipated Release 4 to be 6 months long, with 6-1 month long sprints and, at the end of this time, we would have updated our taxonomy as well as gotten clarification and better alignment on AFRS and/or HRMS coding AND all agencies would have populated some basic infrastructure data in their projects (multi-agency tenants excluded from that statement).

Pretty early on, it became clear this was overly ambitious because of so many competing activities all around that hit me, agencies, and OFM....(legislative session, SDC move, potential realignment, etc.). Additionally, the infrastructure data population relied on a) the security design review completion (which finally got signed off on at the end of April after Apptio implemented a new key management system at the end of March) as well as timely responses from agencies about the availability of their infrastructure data (I still haven't received responses from all agencies asked, despite having been asking since January in one form or another).

For me, April and now half of May effectively became a 'lost' month, as I attended (and presented at) an IT Financial Management Association conference in Pittsburgh, then attended holacracy practitioner training in San Francisco, and took a previously planned vacation, only to return and get hit with whatever cold/allergy/flu illness that was rampaging through town.

The first two 'sprints' ended up being 2 months long each, and I'm just now (mid-May) setting up the last one which will take us through the end of June. And then? Well, assuming realignment happens and OCIO-CTS-DES ETS will be a combined agency on 7/1, there will be other changes (in who I report to, in processes or tools used by the new agency vs this one, available budgets, and wheeee – trying to figure out how to merge the CTS and DES projects! etc.).

NECESSARY RE-BASELINING

We're going to fall a bit short for Release 4. Here were the goals:

- 1) Better alignment via definitions and more solid foundation (security issues settled and user maintenance in the hands of most agencies)
 - a. We've made significant progress on this and while we will ALWAYS be able to improve in this area, I believe we'll hit our goals by end-June as planned.
- 2) Infrastructure data in agency-specific projects
 - a. I'm re-baselining this to 'I hope to have infrastructure data wired into agency-specific projects for at least 2 agencies by end-June, and the other agencies on schedule to get it done by end-September'

So starting in July...we'll continue executing against #2 above AND update/wire in the updated by agency application data at the same time. Where I originally anticipated Release 5 to only be 3 months long – I now think it's wise to expect 6 due to Release 4 overrun and impact of realignment.

RELEASE 4 SPRINTS

Sprints related to Release 4 in Kerika:

- [Sprint 1 \(Jan-Feb\)](#) was largely re-capped in [the Jan-Feb newsletter](#) and dealt predominantly with security and fiscal coding approaches/understanding.
- [Sprint 2 \(Mar-Apr\)](#) will be covered in this newsletter. It deals predominantly with updating the fiscal coding and security activities, policy and standard (including taxonomy) issues as well as setting up for infrastructure data in the tool and reporting out about use of Managed Services.
- [Sprint 3 \(May-Jun\)](#) has been created. It includes some non-TBM work (SDC report draft) as well as some TBM work related to realignment.

You can always access these newsletter recaps on the OCIO website [TBM Timeline page](#). The Kerika boards themselves may, at some point in the future, disappear (read more about that in the Visibility sub-section below...)

MAJOR ACCOMPLISHMENTS IN SPRINT 2

FISCAL AND/OR HRMS CODING UPDATE (AKA DEFINITIONAL ALIGNMENT)

In the Jan-Feb 2015 Newsletter, the recommendations (as well as a few decision points) of the cross-agency IT-Fiscal workgroup were articulated. Update below.

RE: HRMS CODING

Recommendation from DSHS had been to mandate use of market segment field in HRMS to indicate 'IT' staff. I (Mary G) discussed this briefly (phone and email) with Angie Hogenson of OFM Statewide HR in mid-late March.

Decision: As part of the IT Classification work, OFM Statewide HR is considering other types of coding changes and would prefer that we make no changes around market segment field at this time. They will continue to work closely with the TBM effort from OCIO to ensure alignment and improved ability to both identify and correctly (consistently across agencies) crosswalk the new job families into the appropriate IT resource towers/subtowers. This will occur in conjunction with implementation of the new IT classification – stay tuned.

RE: X/Y CODING WITHIN AFRS

The cross-agency workgroup or OCIO had requested

- OFM SWA reconsider whether/not EL (data processing charges paid by agencies to CTS/DES) and EB (telecommunications including voice) should be coded with x/y, and
- clarification around debt service coding, which GL codes would/would not be appropriate to capture IT expenditures, and consistent capture/coding re: cloud computing

On 3/25, Pat Sanborn and Don Charlton of OFM Statewide Accounting (SWA) shared some draft updates to the IT Cost Coding guidance document as well as the Statewide Administrative & Accounting Manual (SAAM) based on the recommendations and these were shared with the TBM Advisory Group who appreciated and agreed with the approach being taken.

Some additional research was needed, and a new request made (to improve distinction between which IT items are contracts vs goods and services).

Summary: Statewide Accounting is in process of routing the finalized proposed changes and has asked for feedback by COB 5/21. If adopted, we will have more consistent coding and identification of 'IT' across agencies in both AFRS and Apptio with respect to the recommendation areas.

Who is Impacted:

- Agency fiscal staff (implement changes)
- Agency-specific TBM Analysts (review existing filtering and allocation rules to ensure consistent with updates)

MODIFICATION OF GLOBAL REPORTS TO ELIMINATE DOUBLE-COUNTING DUE TO ‘EL’

Rates that agencies pay to DES or CTS for IT services are coded as subobject ‘EL’ within AFRS and will remain so.

We have asked agencies to include ‘EL’ DES and CTS payments in modeling their IT spend within Apptio because in terms of IT spend, DES and CTS are really ‘just another vendor’ when it comes to agency IT spend. This shows us the true picture when we are looking at agency reports (either in the agency-specific projects or by using the agency slicer in the global enterprise-wide reports) – but it causes double-counting in the global enterprise-wide reports if we are aggregating the monies that DES and CTS spend to PROVIDE those services along with the rates that agencies are paying to those agencies for those same services.

Because of this, I asked Apptio to help design a solution that would allow us to have the best of both worlds – the ability to retain seeing all agency IT spend (including EL payments) but filter them out of the global reports if/as desired. They have created this filter for the IT Executive Dashboard report in the Global Reporting project, effectively allowing the report user to toggle on/off for whether EL is or is not included in the report (whether you are or are not using an agency or other slicer). This modification is not in the production environment – and we intend to modify all of the global reports in a similar fashion.

GLOBAL DATA DISTRIBUTION DELAYS – AND HANDOFF TO OCIO

Apologies again for the delays in getting the HRMS, AFRS and CAMS data distributed to agency projects for February 2015. This dragged on into mid April in part because Apptio was trying to document and hand-off the duties for doing this to me (in hopes I can hand it off to someone else down the road). We also had some problems with the size of the AFRS file and the use of DataLink to get it to Apptio for the Feb data.

The March data distribution went much more quickly and smoothly, and I’m reasonably confident we shouldn’t experience as significant of a delay in the future.

POLICY AND STANDARDS (INCLUDING TAXONOMY) UPDATE

THRESHOLD INCLUSION

On 2/26, OCIO (Mary Groebner and Michael DeAngelo) and OFM Budget (Regan Hesse and Jay Balasbas) met to discuss the rationale behind extension of the statutory requirement from mandatory participation in the TBM program for agencies exceeding \$10 million in annual IT expenditure to include agencies exceeding \$250,000 in annual IT expenditure.

Rationale: While the smaller IT-budget agencies may not impact the budget quite as much, they do still have significant IT efforts and applications that need to be included in the larger effort of the TBM program.

Decisions Made:

- 1) Keep the extension for participation in the TBM program to include any/all Exec branch agencies (excluding higher ed) with annual IT expenditures equal or greater than \$250,000.

- 2) Continue the approach for reduced participation requirements for agencies with annual IT expenditures in the \$250,000 to \$1,000,000 range.
- 3) Review/revisit annual IT expenditure reporting (in AFRS) annually rather than bi-annually to assess whether an agency has crossed the threshold for participation; once agencies are 'in', they will stay 'in unless an exemption is granted.

Who is Impacted:

1. As part of Release 4 Sprint 3, I'll be reviewing the AFRS FY14 IT spend and notifying the impacted agencies.

POLICY AND STANDARD ADOPTION

The TBM Policy (113) and two associated standards were routed for review and feedback to the TBM agency participants and the larger Customer Advisory Board distribution list in late February.

- Feedback was requested by Close-of-Business (COB) 3/20 and incorporated into the policy and standards for review at the 3/25 TBM Advisory Group meeting.
- This policy and accompanying standards were presented on 4/8 to the Technical Services Board (TSB) Portfolio & Policy Subcommittee and recommended for adoption by the full TSB at the June 2015 TSB meeting.
- State CIO Michael Cockrill has provisionally adopted these standards pending full TSB approval.

The policy and standards can be found on the OCIO website at:

- [Technical Policy 113 – Technology Business Management \(TBM\)](#)
- [Technical Standard 113.10 – TBM IT Expenditure Data Provision](#) (routed as 113-A)
- [Technical Standard 113.20 – TBM IT Labor Data Provision](#) (routed as 113-B)

Who is Impacted:

- Agencies that have changed categories (see prior section re: threshold) may need to make changes.
- Agencies that had not yet categorized expenditures into subtowers (DOH, WSP, DFW) must do so. This is noted as an item to be completed in Release 4 Sprint 3.
- DOT must supply FY15 expenditure data, in appropriate categories and detail and must begin supplying FY16 expenditure data to its project on a monthly basis. This is noted as an item to be completed in Release 4 Sprint 3.
- Agencies unable/unwilling to comply should submit a waiver request to OCIO.

TAXONOMY STANDARD AND BREAKAGE REPORTING

It is OCIO intent to create an additional standard (113.30) that will document the formal taxonomy (IT Resource Towers/Subtowers and Cost Pools) that agencies are to comply with.

A total of 5 meetings were held with OCIO and TBM operational staff to discuss desired changes to the existing FY15 taxonomy structure to reflect our identified business needs and where possible, also better align to emerging industry standards. Changes to IT Resource Towers/Subtowers were finalized on 4/9; additional discussion around Cost Pools will take place on 5/18 at the monthly TBM operational meeting.

The standard is updated as decisions are made, and can be viewed on the OCIO website in its' pre-adoption location: [Technical Standard 113.30 – TBM Taxonomy](#) (previously routed for review as 113-C).

OCIO presented the proposed standard to the TSB Portfolio & Policy Subcommittee on 5/13 and will route for approval through the TBM Advisory Group and larger Customer Advisory Board prior to presentation for adoption at the June 2015 full TSB meeting (and after the 5/18 TBM Operational meeting outcome).

We will make major changes (such as addition/removal of entire subtowers) to the taxonomy only on a biennial basis, but review it for minor changes (definitional tweaks etc.) annually.

Who is Impacted:

- All agencies with agency-specific projects must modify their agency projects to align to the FY16 taxonomy prior to load of July FY16 data (anticipated late August 2015).
- OCIO will update the Multi-agency project as necessary.

ENHANCEMENTS (SIMPLIFICATIONS) FOR AGENCIES RE: TAXONOMY AND BREAKAGE

Based on agency feedback received at the 2/25 training exercise and in subsequent agency work with Apptio, OCIO used some Managed Services consulting hours to simplify and standardize the process of updating taxonomy and identifying/resolving 'breakage' (where cost is not attributed to a resource tower/subtower or cost pool).

We hope this helps improve consistency across agencies and simplify and reduce the level of effort on the part of agencies.

Starting the week of May 18, Apptio will be engaging with a few selected agencies to receive initial feedback on the intended approach while simultaneously implementing the changes in all agency projects. The plan is to complete training (via phone call/WebEx) all agencies on these new enhancements prior to June 2.

SECURITY DESIGN REVIEW AND STANDARDIZATION UPDATE

SECURITY DESIGN REVIEW COMPLETE – APPTIO CLEARED FOR CATEGORY 1-3 DATA!

As you know, the road to getting a completed Security Design Review in place that would clear Apptio for storage of Category 1-3 data has been long – but it is now complete. This eliminates one of the barriers to placing infrastructure data in the tool (the remaining barrier is the agency work necessary to identify, clean and supply this data by agencies).

On April 25, CTS (Agnes Kirk and Doug Hoffer) signed off on the completed Apptio security design review authorizing Category 1-3 data in Apptio. Category 4 data is not to be placed in this tool as appropriate security controls are not in place.

Any agency security officer wishing to review the CTS Security Design Review notes or documentation submitted by Apptio is free to do so by contacting either OCIO (Mary G) or the CTS security team. Please note that some of the specific information submitted by Apptio is covered by a non-disclosure agreement.

SECURITY STANDARDIZATION UPDATE

As previously announced, we are standardizing and simplifying the security roles within and across the agency projects in Apptio. This is our first step toward changing our single-sign-on process so that we pass role information into the product (this will allow agencies to maintain user groups in Active Directory so that they can add/remove/modify agency users without having to request Apptio or OCIO to do so). We are also moving to a model where the agency TBMA will use an agency-specific Power User role and all end users will be placed in an All Projects Read Only role. This was endorsed by the TBM Advisory Group at the 3/25 meeting. Some agencies may still have specific reports and/or data that needs to be secured and should not be viewable by anyone with Apptio access; these agencies will need to craft specific security roles and secure the reports accordingly (CTS is already doing this effectively).

In early April, OCIO made the changes to security roles in the Dev and Stg environments for all agencies other than DSHS and CTS in order to test if there would be noticeable impact/issues. We hope to finalize changes in May in the Prd environment (including for DSHS and CTS) and move on to testing the switch to passing role information but realistically, this may not occur until end-June (competing with realignment activities and other priorities).

INFRASTRUCTURE DATA IN THE TOOL UPDATE

Wow, this has been painful. First we had to wait for the Security Design Review to complete, and now – getting information from agencies has been difficult. I have a better response rate from the third request made to agencies, but haven't had a chance yet to look it over.

Effectively I'm asking agencies:

- Of the 'Master' data elements related to Storage and Servers, which could you get via an automated tool?
- What tool(s) would your agency use?
- Which data elements would your agency think of as Category 3? (this is way less important than it was when I first asked back in January...)
- What frequency would you think reasonable to provide the data (if manually provided, we'd likely go to annual)
- What is your estimated level of effort and are there other agency priorities competing for the same resources

This is all so that I can create a plan that will allow us to develop once (for agencies using similar tools) and implement multiple times, and create and follow a project schedule based on agency availability of resources. I hope to be able to review this data in the coming week and get with Apptio to plan the best approach. I really want to be able to get at least a couple agencies through this before the end of the fiscal year so that, if it takes some time in the new agency (realignment, remember) to get back into Managed Services operating mode – we have something in place.

Stay tuned.

MANAGED SERVICES USAGE & TRAINING UPDATE

I believe the survey bears out the anecdotal feedback I've been getting with regard to Managed Services – agencies are able to move forward with the help of the Apptio consultants.

So far, we have 16 weeks of Managed Services under our belt, and we've paid for 351 consulting hours (at the super low discounted rate). That averages around 22 hours a week. In that time, we've knocked off 32 identified tasks (some for behind-the-scenes work, some for the global project, and a bunch for agency projects). Three agencies (PSP, DVR and AGR) benefitted by being placed in or moved to the multi-agency project (reducing burden on them), while many other agencies have already taken advantage of the consulting hours to update their taxonomy or better understand how their projects were set up – and there are several in the queue.

Agencies receiving consulting hours on completed tasks included: DOL, DOC, LNI, LCB. Agencies underway: WSP, DFW, DSHS. Agencies awaiting scheduling: CTS, DRS, DOR.

Anybody else out there want some time? Let me know.

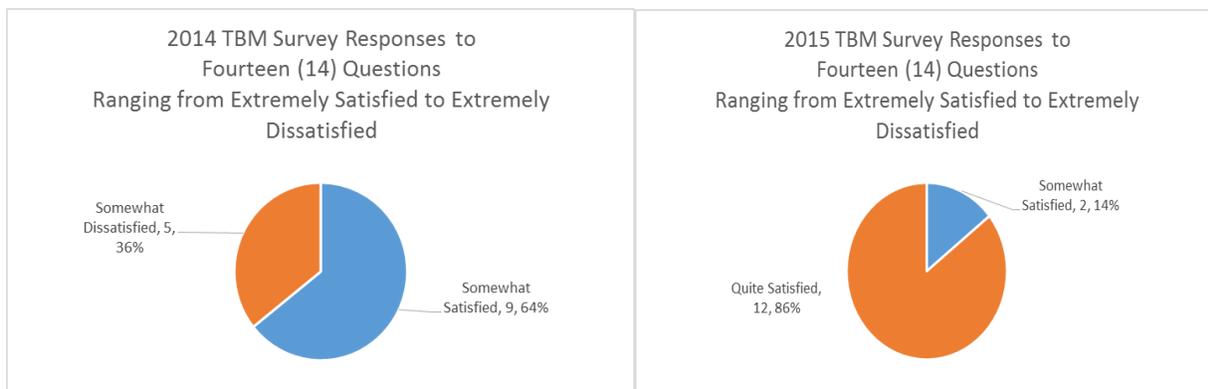
YEARLY SURVEY RESULTS

Last year, OCIO conducted a survey of agencies participating in the TBM program. We repeated this survey this year.

THANK YOU TO ALL WHO PARTICIPATED! While we had a greater number of respondents in 2014 than 2015 (28 vs 17), the actual number of respondents with experience working in/with the TBM program was approximately the same (17 vs 14).

I'm happy to note that overall satisfaction levels appear to be rising (which is hopeful, especially given that this is largely an unfunded mandate). I'm still reviewing the results and trying to identify actions I can take to improve in all areas, especially those that we're still struggling with (effort, perceived cost, perceived lack of value to agency). In the meantime, if you want to go view the results yourselves, please do so at this [2015 completed survey link](#).

Here's a snapshot of the Happiest/Made Progress Results:



Biggest improvements in OCIO Communications (Executive, Special Workgroups, Monthly Meetings) and Work Initiation Process (based on comments, I think this reflects satisfaction with Managed Services contract)

Little to No Progress – Not a useful visual to include here as we barely moved the needle on issues around perceived value to agency ('quite low' both years), perceived effort (slight improvement from 'quite high' to 'somewhat high'), perceived cost (slight improvement but stayed within the 'somewhat

high' category overall) and sort of surprisingly – a little decrease in the number of you that feel confident in agency ability to maintain.

I think part of the value question will resolve itself as we work toward getting infrastructure and application data in the tool – and I hope that the view of effort and confidence in ability will come over time with exposure but it is clear these are the areas that we need to focus on.

CONTRACT STATUS AND FUNDING UPDATE

OCIO has two contracts with Apptio, and there are some contract/funding things happening that you might want to be aware of. These are made slightly (or **infinitely**) more complex by the pending realignment as the contract (starting 7/1) will (assuming legislation passes and begins 7/1 as anticipated) be with CTS rather than OFM.

K1053 which is the software licensing as well as the arrangement for consulting hours at a specified rate wherein those hours get billed back (cost recovered by DES) to the requesting agency.

- The initial period of K1053 expires 6/25 but has 1 year renewal periods available for up to 7 additional years. Several agencies have received automated notification from the Enterprise Contracts Management System (ECMS) that action is needed to renew their existing IAA's before they expire on 6/30. These IAAs are what allowed agencies to work directly with Apptio on consulting hours at agency cost.
- The Governor's, House and Senate budget all currently contain the monies to continue paying for software licensing. It is OCIO intent to ensure uninterrupted use of the software.
- Funding for consulting hours paid through this contract has always been at the discretion of the agency.
- Should you renew your IAAs and if so, with who? Some of you have already contacted me. Please stay tuned for this answer; I'll let you know as soon as I do.

K1609 which is the Managed Services contract which is consulting hours at a slightly lower rate billed to OCIO and usable by requesting agencies.

- This contract will auto-renew.
- Funding for these hours is available thru end of FY15 (6/30/15) due to variance available within the OCIO budget. We do not yet have an identified source of funding for this contract vehicle beyond this date but we are trying to identify if there are funds available.

HELPFUL MATERIALS (ARTICLES, CONFERENCE/PRESENTATIONS, ETC.)

ARTICLE: SPENDING \$ ON IT CAN BRING DOWN GOVERNMENT COST

An interesting study done by researchers at the University of Illinois, University of Michigan and Temple University has been in the press lately. I encourage you to read and share with your management [the Read/Write article about this study](#), which also includes a link to the study itself (at the end). The study will also be published in Management Journal at some point. The bottom line is: if you spend your IT money wisely, it can help bring down the rest of your budget (i.e. leveraging IT well can bring down the cost of doing business). This is at the heart of the TBM program – being able to easily show that we are spending wisely AND how those expenditures support business services.

CONFERENCES AND PRESENTATIONS

IT FINANCIAL MANAGEMENT CONFERENCE

I attended (and presented at) an IT Financial Management Association Conference in Pittsburgh in April. It's a smaller non-glitzy conference that is presented twice yearly with the spring presentation being more focused on government sector than the late summer version. Staff from several other states (CO, UT, MN, NY, MT, AK) as well as higher education institutions were in attendance as well as several major counties and a handful of non-profits (along with some private sector attendees). The audience was about two-thirds fiscal staff to one-third IT staff and by the end of the week my head was swimming with accounting terminology! Next year, the late summer version of this conference will be held in Seattle – and while it won't be the government focus, I think it might still be something to put on your radar. Once I get my head back above water, I may try to share the more relevant presentations with you in some way.

GARTNER PRESENTATION ON DIGITAL BUSINESS AND IT FINANCIAL MANAGEMENT

On 5/7, I attended a presentation by Gartner analyst Barbara Gomolski in Seattle on Flipping IT Thinking to Advance Digital Business. For those agencies who have a Gartner license, if you're interested in either seeing the slide deck or the full research note, I have both and would be happy to check in with Gartner to ensure I can legally share with you. There were some interesting ideas presented that are very consistent with (and reliant upon) having a solid IT financial management (or, TBM in the larger picture) program in place.

USERGROUP – LOCAL AND STATE?

LOCAL AREA (SEATTLE-PORTLAND) USER'S GROUP

Those of us (Mary G (OCIO), Cammy W (CTS), Danika B (LNI) and Jillian M (DOC)) who attended the Seattle Area Apptio Users' Group meeting in December found it extremely worthwhile and helpful. In a prior newsletter, I had provided the link to the materials from that usergroup meeting as well as the accompanying password. Apptio has relocated these materials from their original location. They can now be accessed here:

<http://apptio.wrapfire.com/9b91f1f5-3eab-4290-930a-c9feff92e85c> pw: seattle

ESTABLISHING A STATE OF WA USER GROUP?

At the 3/25 TBM Advisory Group meeting, several members (especially Debbie Stewart of ECY) expressed a desire to get a better sense of what the agencies that are 'leading the way' with Apptio are doing with the product. (This generally refers to CTS, DOC, and LNI at present).

Unfortunately, there was no available IPMA session this could take place at, so we will have to schedule something else – like a State of WA user group meeting (or several). In addition to showing what the more advanced agencies are doing, we'd like to honor the other requests/suggestions...

- DOL and other agencies have also requested that agencies could/should get together and talk about some common reports we might want to have developed.

TBM PROGRAM – 2015 MAR-APR NEWSLETTER (AKA RELEASE 4 UPDATE)

- And the Multi-agency project agencies have still not had a group training session or a discussion around how/if this project could be more useful, though several have reached out individually for training.

Stay tuned. It's on the radar.

SCHEDULED UPCOMING MEETINGS – GOVERNANCE AND OPS

UPCOMING TBM OPERATIONAL MEETINGS:

- 5/18/15 9-10am OCIO or call-in
- 6/9/15 1-2pm OCIO or call-in

UPCOMING TBM ADVISORY GROUP MEETINGS:

- 6/17/15 2:30-4pm OCIO or call-in

VISIBILITY INTO TBM WORK ACTIVITIES - APPROACH

As you all know – I believe strongly in transparency, communication, clear focus, and progress tracking/accountability. This newsletter is part of that effort, as is organizing work into releases/sprints (and communicating via the Kerika boards which are now public). I know you appreciate these efforts based on the survey results!

These boards effectively document my work as program manager - which intersects and interacts with the work of all those in the agencies working on TBM (whether operational or governance capacity) as well as the vendor. Consequently, the use of Kerika to show this work was intended to provide visibility into status for all parties on an ongoing basis.

But...

- 1) I don't think most of you are using the Kerika boards to track work – which means it might just be creating additional overhead for me...and not providing enough value to justify it.
- 2) Life (in the form of vacations as well as work-related travel, and other tasks not purely related to TBM) intervened and contributed to both of these 'sprints' being extended from 1 to 2 months. That's too long for a real 'sprint'.
- 3) [OCIO is now experimenting with holacracy](#) (which necessitates creating 'projects' in yet [another software tool](#) BUT – only those projects that may be of interest to the circle. This means that most TBM activity isn't in there, and the tool also doesn't allow me to capture updates, track end dates etc.) ...and
- 4) We are also preparing for 'realignment' ([the proposed legislation that will merge OCIO with DES ETS and CTS effective 7/1](#)). In the realignment ([version 1 org chart](#)), the TBM program is migrated from under the auspices of Michael DeAngelo to Rob St. John. This may or may not result in different approaches to organizing and/or communicating this work.

I am in process of creating one more 2-month long 'sprint' in Kerika for Release 4 Sprint 3 to be consistent with sprint length for the other 2, and hopefully, be able to close out Release 4 under the existing approach. Release 5 may use a different approach or tool. **I will take into consideration comments made on the recent survey – as well as any additional suggestions you'd like to make for what would work well for you in communicating ongoing status and upcoming tasks.**

COMINGS & GOINGS

AT THE STRATEGIC LEVEL:

Changes to the TBM Advisory Group:

- Confirmed: Daniel Knutson-Bradac (DSHS CIO, replacing Sue Langen), Lisa Kissler (ESD Management Team, replacing Paul Heying), Jibu Jacob (HCA, replacing Adam Aaseby)
- Potential changes due to some personnel leaving (and arriving) at DES and DOH. I will need to check back in with these agencies to verify whether they elect to continue participation in the group and if so, who.

AT THE OPERATIONAL LEVEL:

- Dave Boyle is exiting DES; additionally, with the realignment – we will likely at some future point be combining the DES and CTS models. Discussions will soon get underway to identify necessary actions.
- Tim Gallivan of DFW has promoted into the DFW fiscal shop, but is continuing to support TBM (at least at present). Much gratitude to Tim.
- Kristen Patton at ESD will be the primary operational TBMA, taking over from Joyce Miller who will continue to assist as needed.
- LNI and DSHS are both expected to be onboarding new folks at the operational level in June.
- Kent Andrus is leaving DES and starting a new job with the State of North Carolina effective 6/1. Kent has been the primary support behind moving the global (and for DSHS and CTS, agency-specific) datasets to Apptio on a monthly scheduled basis.