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OSD IT ENTERPRISE IMPLEMENTATION PLAN

INFORMATION MANAGEMENT & TECHNOLOGY DIRECTORATE

The Initial Steps of the Journey toward Improved Digital Experience

(U) FOREWORD

(U) The connectivity and data sharing enabled by information technology (IT) have allowed for an influx of ideas, content, and innovation, expanding influence from a few at the top to many across the bottom and fundamentally changing the way people work. The Office of the Secretary of Defense (OSD) must harness this ability to provide a digital experience that takes OSD mission execution to a new level of performance. This digital experience must begin with a modern and robust technical foundation.

(U) The “OSD IT Enterprise Implementation Plan” identifies the initial building blocks for establishing an OSD IT Enterprise foundation that is continuously modern, free of technical debt, and more secure, ultimately providing a streamlined user experience. It recognizes customer and IT service provider engagement as a critical first step, sets the stage to address the findings and recommendations of the OSD IT Study¹, and provides a high-level roadmap of key actions to take place over the next fiscal year. This plan serves as the response to the Deputy Secretary of Defense memorandum, “Modernizing the Digital Experience in the Office of the Secretary of Defense,” with its progress to be reported through the OSD Management Forum.

(U) A technical foundation does not equal ultimate success. Process change and broad workforce adoption must follow, two areas of focus not lost by those executing this plan. Execution success will continue to rely on leadership support, collaboration across OSD, and adequate resources. As we execute, we will maintain focus on the outcomes – a better OSD IT Enterprise, a more empowered OSD workforce, and a unified OSD.

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¹ (U) The OSD IT Study can be found at: <https://dod365.sharepoint-mil.us/:b:/t/DODCIO-OSD/IMT/EbMAreWM7HFCkniY4MpC1GkBg8-xg1NVERkbq9dZ6cqHCQ?e=FzS0KK> (CAC login required)

(U) BACKGROUND

(U) In April 2022, the Director of Administration and Management (DA&M) initiated a study to review the current OSD IT posture as it related to quality of service, performance, and gaps in customer requirements. The OSD IT Study found that a lack of IT requirements and resources at the Pentagon and Mark Center diminished user experience over time. There was minimal management, standardization of services, and governance to effectively maintain the upkeep of OSD IT. Customers expressed concern with the level of IT support provided and network performance, and the resultant impact on their ability to conduct their mission.

(U) To address the findings and recommendations of the study, the Deputy Secretary of Defense designated DA&M as the senior official responsible for information management and technology in OSD and to serve as the OSD chief information officer (OSD CIO). The Office of DA&M (ODA&M) established the Information Management and Technology (IM&T) Directorate to perform these functions and to manage OSD IT as an enterprise. The **OSD IT Enterprise** is a concept meant to unite the IT activities of OSD's Principal Staff Assistants (PSAs) and the six Defense Agencies & Field Activities (DAFAs) that have a presence at the Pentagon, Mark Center, and related facilities in the National Capital Region². By uniting the IT management of these previously disconnected organizations, IM&T can bring to bear the power of a collective voice in driving the IT service providers' delivery of OSD IT requirements.

(U) IM&T MISSION

(U) Deliver a world-class IT experience, enabling the highest levels of DoD leadership decision-making.

(U) Users of the OSD IT Enterprise have distinct missions ranging from managing the budget process to researching the development of new weapons systems. However, underlying each of these missions is IT. IT capabilities, from video teleconferencing to hosting an application or system in a data center or cloud environment to using basic office productivity tools, form the connective tissue that ties OSD missions together. It is the mission of the IM&T Directorate under ODA&M to establish this connective tissue, ensuring a world-class IT experience that enables the highest levels of DoD leadership decision-making.

(U) IM&T, in close coordination with the PSAs and six DAFAs, will transform a current environment of declining IT performance and cybersecurity compliance into a future environment that is more responsive to customer needs, ensuring compliance. Users of the future OSD IT Enterprise will be able to seamlessly collaborate, conduct analysis, and share information faster and more securely from anywhere they must conduct their mission. They will experience faster IT support response, more

² (U) The OSD IT Enterprise represents the offices of the Principal Staff Assistants, Washington Headquarters Services (WHS), Pentagon Force Protection Agency (PFPA), Defense Technology Security Administration (DTSA), and parts of the DoD Education Activity (DoDEA), Defense Human Resources Activity (DHRA), and the Defense Security Cooperation Agency (DSCA).

persistent and stable connectivity, more reliability, and greater access to the latest proven technologies. IM&T will lead implementing this transformation by instituting constructs to better engage users and their respective organizations, enable forward-looking strategic planning, and conduct more robust program analysis and asset management. Figure 1 describes this transformation.

(U) Figure 1: OSD IT Enterprise Transformation



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(U) ORGANIZING FOR SUCCESS

(U) In preparing for successful implementation, IM&T continues to carry out the organizational activities required for office stand up. These activities include:

- (U) Recruiting and building a strong team of diverse skillsets
- (U) Working through the Program Budget Review FY24-28 process to obtain resources for the office and future modernization activities (e.g., service desk modernization and life cycle replacement/remote work operations), and then planning the execution of said activities
- (U) Developing documentation to codify the roles and responsibilities of IM&T, OSD Components, and IT service providers

(U) In addition to the tasks identified in this plan, IM&T, on behalf of DA&M, will perform the functions expected of the OSD CIO to include providing access to training and improving processes to enhance the adoption of technology. To hold ourselves accountable to the outcomes we intend to achieve, IM&T will provide an annual report on the state of OSD IT, which will include accomplishments, challenges, and areas for improvement to ensure transparency with stakeholders.

(U) STRATEGIC GOALS

(U) IM&T aims to achieve three goals in implementing a better OSD IT Enterprise. These goals will form the framework for implementation activities.

(U) Goal 1 – Flip IT delivery model from service provider-led to customer-led

(U) Today, existing OSD IT service providers deliver IT services and solutions with minimal input from customers. This results in capabilities and services that do not necessarily meet the needs or priorities of users. To transform the delivery of IT services to be customer-led, IM&T will first establish formalized governance and clear authorities to manage customer requirements, advocating for those requirements with IT service providers and resource managers.

(U) Goal 2 – Treat OSD as an IT enterprise

(U) Today, individual OSD Components pursue their own needs, either working directly with an IT service provider or doing it themselves. This approach leads to potentially siloed and incompatible solutions, shadow IT, and cost inefficiencies. IM&T will manage OSD IT as an enterprise, holistically assessing and prioritizing requirements for best value, leveraging DoD enterprise services for efficiencies, and providing DoD IT enterprise capabilities to OSD for an improved digital experience, with outcomes supported by metrics. Treating OSD as an IT enterprise begins with understanding the current environment. IM&T partner with service providers to understand current IT capabilities and assets, including how those capabilities and assets align with resources. This review will form the basis for additional analysis to determine which areas should be addressed first in transforming the OSD IT Enterprise.

(U) Goal 3 – Maximize use of technology to support the OSD mission

(U) Today, delivery of IT services is a series of disjointed efforts by multiple service providers and internal organizational IT staff³. This results in the inefficient use of technology and inconsistent maturity of capability across OSD. IM&T will seek to implement oversight and governance across OSD to reduce the overall IT management burden on PSAs and DAFAs, freeing their resources to focus on their organization's specific mission. Ensuring efficient use of resources does not just include technology implementation but also the communication and training required to ensure full-scale adoption.

³ (U) For more information regarding the current state analysis, refer to the OSD IT Study found at: <https://dod365.sharepoint-mil.us/:b:/t/DODCIO-OSD/IMT/EbMAreWM7HFCkniY4MpC1GkBg8-xg1NVERkbg9dZ6cqHCQ?e=FzS0KK> (CAC login required)

(U) IMPLEMENTATION PLAN

(U) This section provides a more granular view of the activities associated with each goal for FY23-FY24.

A key assumption for all activities is that they are properly resourced, both in personnel and in funding, to meet the estimated completion date. Table 1 provides a summary of FY23-FY24 activities for convenient reference.

(U) Table 1: Implementation Plan for FY23-FY24

ID	Task and Task Description	Suspense
G1	Flip IT delivery model from service provider-led to customer-led	
G1.1	Establish monthly PSA and IT service provider listening sessions	Q1FY23
G1.2	Establish OSD IT Enterprise governance	Q2FY23
G1.2a	Establish OSD IT Enterprise Committee	Q2FY23
G1.2b	Reconstitute Pentagon Area Customer Council (PACC)	Q3FY23
G1.3	Develop Standardized OSD MOA for common IT with service providers	Q3FY23
G1.4	Establish a stakeholder communications plan	Q1FY23
G1.5	Create Annual Report on State of the OSD IT Enterprise	Q3FY24
G2	Treat OSD as an IT enterprise	
G2.1	Baseline current OSD IT consumption in partnership with service providers and evaluate alternative resourcing strategies	Q4FY23
G2.2	Implement, standardize, and reshape end user device asset management	Q4FY24
G2.3	Develop plan to adopt and use DoD enterprise processes and tools for IT performance management	Q4FY23
G2.4	Create Annual Performance Report on OSD IT Performance	Q3FY24
G3	Maximize use of technology to support the OSD mission	
G3.1	Develop an OSD IT Enterprise Modernization Strategy	Q4FY23
G3.2	Modernize OSD IT policy to keep pace with technological developments	Ongoing
G3.3	Provide a dynamic learning environment for the OSD IT Enterprise	Q2FY24

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(U) IM&T is taking a phased approach to implementation. Phase 1 represents foundation IM&T capabilities, while phases 2 and 3 represent the execution and modernization of the OSD IT Enterprise. IM&T will track the activities of subsequent phases using the processes established during Phases 1, 2, and 3.

- **(U) Phase 1 – Foundation Building:** Establish the mechanisms to enable better user engagement, consistent IT requirement capture and prioritization, and digital strategic planning.

This includes governance, a process for prioritizing and implementing IT requirements, and a review, in partnership with DISA and other service providers, to understand the alignment of existing IT capabilities and associated resources to inform planning activities. As these activities occur primarily in FY23 and FY24, Phase 1 is the focus of this implementation plan.

- **(U) Phase 2 – Priority Execution:** Leveraging development in Phase 1, begin to work with IT service providers to implement key initiatives against a set of measurable outcomes. Communicate progress with OSD IT Enterprise users, coordinate with IT service providers on delivery, and leverage appropriate governance forums (the OSD IT Enterprise Committee and PACC) to address any issues.
- **(U) Phase 3 – Continuous Modernization:** Through the processes established in Phase 1 and refined in Phase 2, continue to manage a pipeline of requirements and initiatives to enable the continuous modernization of the OSD IT Enterprise. Communicate status of activities through measurable outcomes to OSD IT Enterprise users on a regular basis.

(U) Goal 1 – Flip IT delivery model from service provider-led to customer-led

(U) The outcome of this goal is to establish a formalized mechanism (through governance forums) that allows for increased dialogue between customers and IT service providers to enable the capture, prioritization, and tracking of customer requirements from initial identification through to implementation. The structure is intended to build trust across the OSD IT Enterprise and to maintain a constant pulse of customer needs.

ID	Task and Task Description	Suspense
G1.1	<p>Establish monthly PSA and IT service provider listening sessions</p> <p>A monthly cadence of listening sessions with individual PSA IT leadership and IM&T to discuss status of IT projects, challenges, training opportunities and ways that IM&T can assist in the mission of modernizing IT.</p> <p>A monthly cadence of listening sessions with IT service providers to discuss status of IT projects, challenges, and ways that IM&T can assist with implementing requirements.</p>	Q1FY23
G1.2	<p>Establish OSD IT Enterprise governance</p>	Q2FY23
G1.2a	<p>Establish OSD IT Enterprise Committee</p> <p>A quarterly session convening PSAs and select agencies chaired by IM&T, with the objective of prioritizing and managing the delivery of IT requirements. Initial deliverables include charter and requirements process.</p>	Q2FY23
G1.2b	<p>Reconstitute Pentagon Area Customer Council (PACC)</p> <p>A quarterly session held in partnership with IM&T, Joint Staff, Army, and other customers drawing service from Pentagon IT service providers with the objective of changing the paradigm from service provider-driven to customer-driven for common IT requirements. Initial deliverable includes the charter.</p>	Q3FY23
G1.3	<p>Develop Standardized OSD MOA for common IT with service providers</p> <p>The Memorandum of Agreement (MOA), initially between DA&M and DISA that focuses on common IT, with the objective of standardizing IT services, establishing performance metrics, service level agreements, and defining roles and responsibilities. It will be reviewed and updated on a regular basis, with the goal to eventually add in additional service providers such as the Defense Intelligence Agency (DIA).</p>	Q3FY23
G1.4	<p>Establish a stakeholder communications plan</p> <p>The OSD IT Enterprise stakeholder communications plan details the methods and actions IM&T will take to ensure proper communication of IT status and issues, both internally and externally. The communications plan will be a living document.</p>	Q1FY23
G1.5	<p>Create Annual Report on State of the OSD IT Enterprise</p> <p>Create and distribute an annual report on OSD IT to OSD and associated stakeholders. The report will provide a snapshot into OSD IT and include the planning strategies for ongoing future efforts and enterprise network capabilities. The report will also include metrics and performance targets pulled from the MOA and any associated Service Level Agreements and will feed into the consolidated Annual Performance Report in Goal 2.4. As an example, the metrics requested by Cost Assessment and Program Evaluation (CAPE) during the budget cycle for “outcome-based metrics on IT performance and security... and baseline IT performance metric data during the annual budget cycle” will be included in this report.</p>	Q3FY24

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(U) Goal 2 – Treat OSD as an IT enterprise

(U) The outcome of this goal is to obtain a comprehensive understanding of the current IT baseline to determine opportunities for delivering IT components as an enterprise. It sets the stage for continuous modernization and resource planning at the enterprise level.

ID	Task and Task Description	Suspense
G2.1	<p>Baseline current OSD IT consumption in partnership with service providers and evaluate alternative resourcing strategies</p> <p>In partnership with DISA, IM&T will review current OSD IT consumption levels and strive for a greater understanding of cost drivers to both better inform future requirements and to determine whether alternative funding models might be worth pursuing. It is anticipated that this effort will provide baseline cost and consumption information by component, thereby providing increased visibility and transparency for OSD and the Department to inform future actions.</p>	Q4FY23
G2.2	<p>Implement, standardize, and reshape end user device asset management</p> <p>The objective of this task is to standardize and streamline end user device asset management, with a potential outcome being the elimination of the need for organizations to perform this function themselves. Deliverables include updated processes for maintaining end user device inventory, for checking end user devices against cybersecurity requirements to ensure maintained protection, and for addressing property accountability policies. The overall IT asset management plan for OSD will address technology and process modernization and be scoped to address IT assets that should be more closely managed by IM&T.</p>	Q4FY24
G2.3	<p>Develop plan to adopt and use DoD enterprise processes and tools for IT performance management</p> <p>IT performance management tools provide IM&T with visibility of OSD IT Enterprise performance and allow for appropriate decision-making. Using the metrics defined in the MOA, IM&T will work with IT service providers to understand and analyze performance data collected from tools that monitor performance management at the endpoint, network, and user experience tiers. IM&T will leverage the enterprise approach defined by CAPE's IT Performance Issue Team, ensuring that data is standardized and accessible via enterprise decision-making tools.</p>	Q4FY23
G2.4	<p>Create Annual Performance Report on OSD IT Performance</p> <p>Building upon the metrics defined in the State of OSD IT Enterprise report, work with OSD IT service providers to create and distribute an annual report on the performance of OSD IT. This performance report will include metrics captured from the IT performance management tools utilized in Goal 2.3 and will be consolidated with the Annual OSD IT Report from Goal 1.5.</p>	Q3FY24

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(U) Goal 3 – Maximize use of technology to support the OSD mission

(U) The outcome of this goal is to drive the implementation of technology for a better digital experience across the OSD IT Enterprise. This includes identifying modernization objectives, working with customers and IT service providers to define IT requirements, implementing requirements on an incremental basis, and ensuring final delivery meets or exceeds user expectations.

ID	Task and Task Description	Suspense
G3.1	<p>Develop an OSD IT Enterprise Modernization Strategy</p> <p>The OSD IT Enterprise Modernization Strategy will provide a technology roadmap for modernizing the OSD IT Enterprise. Using higher-level documentation such as the National Defense Strategy, DoD Strategic Management Plan, and DoD Digital Modernization Strategy as guidance, IM&T will develop a strategy that aims to standardize Pentagon and Mark Center infrastructure in alignment with current architectures. It will define strategic objectives for IT areas such as JWICS support, workforce of the future, cloud services adoption, mobility/remote/hybrid work, cybersecurity, section 508 compliance, and mission IT enhancements, maintaining alignment with the larger DoD IT enterprise.</p>	Q4FY23
G3.2	<p>Modernize OSD IT policy to keep pace with technological developments</p> <p>Work with relevant stakeholders such as DISA, DoD CIO, and others to update current OSD IT policy where necessary. This will allow for a more flexible and enhanced user experience, maximizing DoD's investment into modern IT capabilities to support video conferencing and remote work.</p>	Ongoing
G3.3	<p>Provide a dynamic learning environment for the OSD IT Enterprise</p> <p>Provide OSD additional IT learning opportunities beyond the historical offerings of web-based training articles and slideshows, thereby maximizing investments made into IT capabilities such as DoD365. Examples of enhanced training opportunities include live webinars and individual/small group sessions with subject matter experts.</p>	Q2FY24

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