

EPLC Tailoring

A “Lean” Approach

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Objectives

- * Tailoring project deliverables in EPLC.
- * What do we mean by “Tailoring”?
- * What does it mean to have a “lean” approach?
- * Tailoring examples.

EPLC

- * EPLC is mandated by HHS to provide a repeatable approach to project management and investment control.
- * Each project is expected to produce adequate artifacts, reviews, and governance activities to control the project and generate the desired outcomes.

Tailoring

- * “Tailoring consists of customizing or waiving particular Enterprise Performance Life Cycle (EPLC) phases, activities, deliverables or project reviews based on your specific project requirements or specific business needs.”
- * “Tailoring is completed during the Planning Phase of the project and is documented in the Project Process Agreement deliverable.”
- * Every project is different.
- * It is the project manager’s responsibility to insure that the project meets the minimum governance needs. This is done in consultation with Critical Partners and the IT governance organization.

Tailored Activities in EPLC

- * EPLC Framework v1.4 provides “a complete list of activities, deliverables and reviews that are necessary to properly manage and control a large-scale, mission-critical, high-risk system.” (EPLC Framework 1.4, pages 25-26). These deliverables and activities are defined in Appendix C of the framework 1.4, pages 82-90.
- * Most projects do not meet the definition of “large-scale, mission-critical, high-risk.”
- * Since most projects do not need every step present in the EPLC Framework, what is the minimum?

Tailored Activities in EPLC

- * “Identifying the business need.”
- * “Documenting correct, clear and adequate functional and non-functional requirements.”
- * “Following processes that ensure the system will be able to operate within the as-is and/or target enterprise architecture.”
- * “Adequate IT solution testing.”
- * “Appropriate operations and maintenance documentation.”

Tailored Activities in EPLC

- * “Identifying the business need”: **Business Needs Statement, Business Case, Project Charter.**
- * “Documenting correct, clear and adequate functional and non-functional requirements”: **Requirements Management Document.**
- * “Following processes that ensure the system will be able to operate within the as-is and/or target enterprise architecture”: **Design Document, Preliminary Design Review, Detailed Design Review.**

Tailored Activities in EPLC

- * “Adequate IT solution testing”: **Implementation Plan, Test Plan, Test Plan Reports.**
- * “Appropriate operations and maintenance documentation”: **Training Plan, Training Materials, User Manual, Operation & Maintenance Manual, Business Product, Operational Readiness Review.**

A “Lean” Approach

- * A lean approach means producing the correct number of artifacts and reviews to develop proper stewardship of scarce resources, while leaving the project manager time to insure project goals and requirements are met.

How many artifacts is the “correct” number?

- * Some artifacts and stage gates are mandatory per the EPLC framework, regardless of project scope.
- * The correct number of artifacts, activities, and stage gates in a project is the fewest number that can be created or conducted and still manage the project successfully while satisfying the needs of governance.
- * The project manager will present documentation (PPA) with justification to the IC EPLC Chartered governance board for approval on the tailored approach selected for maximum oversight with a reduced artifact count.

Key Points to Consider

- * Cost
- * Risk
- * Schedule
- * Acquisition Strategy
- * Development Methodology

Examples of Tailoring

- * Here are two recent examples of tailoring from NIA:
- * Project A: Redesign of Intranet and migration of SharePoint to updated design and newest version.
- * Project B: Automate HR process using SharePoint and InfoPath.

Tailoring: Project A vs. Project B

- * Project A: Approximately 3600 contractor hours over a 12-month period.
- * Project B: Approximately 1600 contractor hours over a 10-month period.

Tailoring: Project A vs. Project B

- * Project A:
 - * 23 EPLC Artifacts.
 - * 9 EPLC Phases.
 - * 8 EPLC Stage Gates.
 - * Although classified as a supporting investment, the project scope is broad and affects multiple lines of business within the IC.
- * Project B:
 - * 9 EPLC Artifacts.
 - * 4 EPLC Phases.
 - * 4 EPLC Stage Gates.
 - * Project supports a single line of business, and the system under development is a minor system contained within a major system.

Tailoring: Project A vs. Project B

- * Project A represented a much larger investment of total time and financial resources. Also, the scope of the project represented a business impact to a large number of users within the IC.
- * Alternatively, project B is a much smaller, tightly targeted investment with a small group of stakeholders, and much lower levels of personnel and financial resources. This project requires fewer EPLC deliverables and reviews to insure a successful outcome.

Summary

- * EPLC should be tailored to meet the needs of your project. Creating unnecessary artifacts is inefficient.
- * The project manager must determine the level required to meet the governance needs of a given project.
- * Smaller projects need fewer steps, but there is a minimum threshold of activities that must be met with all EPLC projects, as defined in the EPLC Framework.

Questions?

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