Appendix I: Agency Self Assessment

The questions below are for self-assessment, so that agencies can begin to evaluate the maturity level of their TBM practice in the Technology focus area. Questions are organized according to the key technical considerations discussed in this paper and include both yes/no and short answer. Answers to the yes/no questions highlight agency specific factors that will impact decisions for the five technical considerations. Teams should compare short answers to create consensus and a common understanding of the current maturity level of the agency's TBM practice. Distribute these worksheets to your team to fill out.

Automate vs Digitize

1. Is your TBM process an update to or extension of the existing CPIC process that has been in place for some time?

    ☐ Yes   ☐ No

2. Is your agency looking to optimize existing processes as part of this TBM implementation/improvement?

    ☐ Yes   ☐ No

3. What percentage of the budget data is pulled from outside business partners on an ad hoc basis?

    ☐ Yes   ☐ No

Copy vs. Connect

1. If you are buying a TBM commercial-off-the-shelf tool (COTS), does the tool allow for ingestion of external data sources?

    ☐ Yes   ☐ No

2. Which source systems have existing development resources to create needed data interfaces?

3. Which source systems (Finance, HR, EA, etc.) have current API endpoints or other methods of sharing relevant data for use by other business units?

Buy vs. Build

1. Does your agency currently have a TBM application?

☐ Yes ☐ No

2. If not, do you plan to purchase a COTS tool?

☐ Yes ☐ No

3. How do you currently view IT spending data in the TBM taxonomy?

4. How much flexibility do you require in terms of features that are not readily available in existing tools?

5. Have you done a comparison using your own labor rates of the buy vs. build alternatives, including licensing and O&M costs?

Access vs. Security

1. Has a review been performed on TBM data to assess the potential security and privacy concerns?

☐ Yes ☐ No

2. Are there existing user groups and permissions that can be leveraged when determining access to TBM data?

☐ Yes ☐ No

3. What are the users roles that need access to TBM data and what restrictions need to be applied for each role?

4. How important to the kinds of analysis you wish to do is the ability to drill down to the most granular source data? Are there only certain individuals/roles that need that ability?

Application vs. Services

1. Do key business partners have complete access to their TBM data for use in their internal management and ongoing operations?

☐ Yes ☐ No

2. Can you see a basic breakdown of your current IT spending across multiple organizational categories (i.e. Financial, IT, Business Services, etc)?

☐ Yes ☐ No

3. Are visualizations and reports sophisticated and targeted enough that you can quickly use them as the basis for evaluation of progress and to support decision-making?

☐ Yes ☐ No

4. Are the users equipped with the skills and tools to leverage services if they are provided?

☐ Yes   ☐ No

5. How informed are stakeholders about their costing options and the impact different options have on their business?