U.S. Office of Personnel Management

Information Technology Strategic Plan

Fiscal Years 2023-2026
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Message from the OPM Director

The people of the U.S. Office of Personnel Management (OPM) are champions of talent for the federal government. We lead federal agencies in workforce policies, programs, and benefits in service to the American people. Information Technology (IT) plays a critical role at OPM, and is central to enhancing our customers’ experiences, from job seekers using USAJOBS® to annuitants accessing retirement services.

By prioritizing an enterprise-wide approach that better modernizes our IT investments, we will create a new vision of work, together. We will position the federal government as a model employer through innovation, leadership, and by promoting a diverse, equitable, inclusive, and accessible federal workforce based on merit. We will build a rewarding culture that empowers the workforce to solve some of our nation’s toughest challenges. And we will help define the future of work, attracting early career talent and equipping current and future federal workers with the new skills they need to succeed.

We believe that only through effective and efficient IT can OPM accomplish its mission. Over the next four years, we will improve OPM’s program effectiveness by developing a more modern and intuitive federal employee customer experience from hiring through retirement, improving online customer service, and developing a comprehensive data architecture and analytics platform to enable improved outcomes.

At OPM, we work just as hard for the two million people who serve in the federal civilian workforce as we do for the American people. We have an excellent opportunity for the Office of the Chief Information Officer (OCIO) to make a lasting impact on all federal agencies for the benefit of the American people. Accomplishing the goals and objectives in this IT Strategic Plan will help position the federal government as that model employer.

Kiran Ahuja
Director
Message from the OPM CIO

This IT Strategic Plan has been developed to carefully align with OPM’s four-year Strategic Plan for FY 2022-2026. This plan calls for IT to drive positive operational outcomes across OPM by leveraging digital technologies that better manage complexity, provide scale, and mitigate risks for the federal workforce. It is an ambitious vision, based on a commitment to data-driven decision making enabled by cloud-based access to a variety of information sources.

OPM has a vibrant future, and a strong need to better modernize its services has been identified by both internal and external analysis. There are a number of legacy IT systems that must be addressed and rectified. The purpose of this Strategic Plan is to provide the to OPM’s IT modernization future.

Additionally, during these past eight years, technology innovation has not remained static. For example, worldwide cloud revenue in 2014 was $12.4 billion. This has now grown to $331 billion in 2022, a 27-times explosion. As stated in the President’s Management Agenda: “Cybersecurity and IT modernization are critical tools that must be at the foundation of government management.” We must catch up and keep pace with the evolving technology landscape.

This OPM IT Strategic Plan is designed to close the gap on that pace of technology change versus our legacy technology debt. It highlights our OCIO vision, mission, and guiding principles from last fiscal year, which laid the foundation for this plan.

To develop this IT Strategic Plan, we engaged our program offices, reviewed external and internal IT studies, and hosted many sessions to develop the plan’s framework. The plan highlights the methodology and approach that we used, and includes detailed appendices that demonstrate the alignment of the enterprise IT initiatives to the agency’s Strategic Plan.

Finally, this can’t just be a technology product roadmap. To deliver on this vision, we need the personnel with capabilities and skills in these digital technologies and IT management practices. A key goal of this Strategic Plan is to provide the training and mentoring required to develop and maintain such a workforce.

My commitment as OPM’s CIO is to leverage emerging technologies, cloud services, and modern IT management practices to help OPM bring the best HR processes, tools, and techniques to the federal workplace.

Guy Cavallo
Chief Information Officer
Executive Summary

Information Technology (IT) will play a central role in achieving the bold vision expressed in OPM’s FY 2022-2026 Strategic Plan, as the agency enhances customer experiences, modernizes retirement systems, and enhances data security to position the federal government as a model employer. To understand how OPM will harness technology to meet this objective, OCIO has prepared this four-year IT Strategic Plan for FY 2023-2026.

The following pages describe OPM's IT transformation to align all IT staff, processes, and assets, supporting the agency’s goal of empowering the largest employer in America: the United States government. To develop this plan, insights were captured through interviews with program office leaders and staff to assess the current state of operations and define the requirements for meeting OPM’s objectives. The discussions revealed the need for:

- More innovation and more collaboration on appropriate use of emerging technologies
- Improvements and better visibility into service performance
- Better communication from OCIO about its plans
- More participation from OCIO customers in defining critical requirements

This OCIO IT Strategic Plan is the product of a comprehensive process, and encompasses six strategic goals, 25 strategic objectives, and more than 100 specific initiatives that will optimize IT operations to support the services OPM provides. The plan calls for adopting a modern IT management approach to support OPM’s programs, federal agencies, and other stakeholders by investing in its leadership, workforce, and governance structures.

The plan also provides details on key initiatives for IT modernization, which leverage IT to elevate productivity and enhance collaboration while simplifying operations, enhancing cybersecurity, and reducing costs. These key enterprise IT initiatives include:

- **Transform with a Cloud First strategy** by migrating OPM’s business solutions from on-premises data centers to the cloud.
- **Lead in Supporting the Hybrid Workforce** by offering OPM staff the productivity resources needed to support and empower today’s hybrid workforce.
- **Improve Retirement Services experiences** by modernizing platforms to create technology solutions and user interfaces that offer comprehensive access to retirement services securely and intuitively.
- **Update Technology for Federal Employee Health Benefits** by modernizing and streamlining current systems and implementing the new USPS Health Benefits solution with decision support tools that optimize the customer experience.
- **Modernize OPM.gov** to strengthen and empower the federal workforce.
- **Optimize USA Suite (USAJOBS®, USA Staffing®, USA Hire™, USA Performance®, and USA Learning®)** by developing new solutions while enhancing existing online platforms with improved user interfaces that elevate the customer experience.
Executive Summary

- **Enhance Cybersecurity** by implementing—and staying current with—the latest cloud-based security tools to protect OPM systems and data.
- **Improve Diversity, Equity, Inclusion, and Accessibility (DEIA)** by ensuring that all technology solutions address DEIA policies.
- **Improve Data Access and Utilization** to enable and support data-driven decision making.
- **Deliver enterprise technology contracts** by partnering strategically with the Office of Procurement Operations (OPO) so that OPM has the IT contracts needed to optimize support of program office operations.
- **Complete the technology separation from the Defense Counterintelligence and Security Agency (DCSA)** so OCIO can focus exclusively on supporting OPM's mission.

The six strategic goals of this strategic plan lay the groundwork for OPM and OCIO to succeed in both fully adopting modern IT management capabilities and delivering on these key technology initiatives:

- **Strategic Goal 1** focuses on investing in OPM OCIO's workforce.
- **Strategic Goal 2** lays the foundation for enhancing customer value.
- **Strategic Goal 3** focuses on improving the customer experience while optimizing OPM business processes.
- **Strategic Goal 4** details the modernization of IT procurement, development, and deployment strategies.
- **Strategic Goal 5** focuses on innovation, making the latest technologies and processes available to support OPM's missions.
- **Strategic Goal 6** states that OCIO will make no compromise in its cybersecurity commitment to protecting sensitive federal personnel data and supporting systems.

In summary, OPM's four-year IT Strategic Plan for FY 2023-2026 calls for OCIO to drive positive operational outcomes across the agency by leveraging digital technologies that manage complexity, provide scale, and mitigate risks for the federal workforce. It is an ambitious vision, based on a commitment to data-driven decision making enabled by cloud-based access to a robust set of technology resources. OCIO will partner with OPM program offices to enable all IT investments to align with the agency's strategic goals.
The recently released OPM FY 2022-2026 Strategic Plan establishes four strategic goals on OPM’s journey to help the federal government become a model employer, while setting an example for private and public sector employers in America and around the world. Under each strategic goal are OPM’s objectives and initiatives describing how OPM plans to rebuild, empower, and support the federal workforce.

OCIO has a major role in a key component of Goal 2 under Objective 2.5, which states:

Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements.

By specifically highlighting Objective 2.5, OPM’s leadership acknowledges that the OPM legacy technology debt it has been carrying for years is a significant inhibitor to the agency’s ability to accomplish its four strategic goals. This OPM IT Strategic Plan was developed in alignment with and supports the agency’s strategic goals. To best support those goals, this plan also aligns to the President’s Management Agenda (PMA) and the Executive Order 14058 Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government. As OPM advances the priorities set out in the PMA and its own Strategic Plan, the agency will focus on improving the experience of the life “journey map” of a federal employee, as shown on page 8.

This map follows the path that a federal employee would take from applying for a federal job, to being hired, to transferring to a different agency or a different role, to potentially leaving federal service and returning to an agency, and finally to retirement.

Instead of approaching each of these events as isolated silos, OCIO is collaborating across the OPM program offices to develop an enterprise, modernized, integrated, customer-focused approach to the supporting systems and their operations.

The remainder of this document is organized as follows. First, it describes the methodology used to develop this plan, showcasing the foundational use of OCIO’s vision, mission, and guiding principles. This is followed by a description of the OCIO’s overall enterprise management approach, outlining OCIO’s management priorities, and how OCIO has an integral role in achieving OPM’s cross-agency priority goals. To implement its management approach, the document describes OCIO’s approach in developing its leadership and workforce, and implementing a comprehensive governance process that strategically meets the needs of OPM.

The next section of the document describes OCIO’s enterprise IT initiatives. While some initiatives are focused on specific customers, including the modernization of Retirement Services and OPM.gov, others support all customers, such as Cloud First, and business intelligence and data visualization.

The heart of the document is the introduction and description of OCIO’s six strategic goals. These six strategic goals align with and support OPM’s goals and encompass OCIO’s enterprise management approach and enterprise IT initiatives. Strategic objectives are presented for each strategic goal, with the rationale on how they support the strategic goals as well as OCIO’s customers. Each strategic objective includes the initiatives required to meet these objectives.

There are three appendices at the end of the document. Appendix A is a one-page “placemat” that shows OCIO’s six strategic goals and related strategic objectives. Appendix B depicts how the OCIO’s strategic goals map to OPM’s goals. Appendix C provides an OPM IT Strategic Roadmap, which includes more detail on the initiatives OCIO will undertake during the four-year IT Strategic Plan timeframe.
Joining Federal Service
Onboarding into Federal service includes new employee orientation, badging and clearing, and benefits education and enrollment.

Starting Up
Once onboarding is complete, employees settle into their daily duties.

Managing the Day-to-Day
Through ongoing efforts to manage daily work and life events, and navigate their career, employees experience many changes throughout their time in Federal service.

Performing, Adapting & Growing

Moving On
Employees wind their Federal careers either by retiring or leaving the Federal Government.
Methodology

The OPM IT Strategic Plan has been developed specifically to align with and support OPM’s four strategic goals. To do so, this four-year IT Strategic Plan includes six strategic goals, 25 strategic objectives, and more than 100 initiatives to improve IT delivery for all of OPM’s services.
Methodology

The approach in developing this IT Strategic Plan was based upon the close alignment of improving delivery of OPM’s core services by enhancing the customer experience across all program offices. The plan’s foundation is OCIO’s strategic vision and mission statement, along with its guiding principles. With these key building blocks in place, OCIO solicited input from various stakeholders, including extensive discussions with senior members of the OPM program offices. OCIO also reviewed existing and evolving guidance from Congress, Office of Management and Budget (OMB), Government Accountability Office (GAO), the OPM Inspector General (IG), and external independent assessments, incorporating valuable recommendations to improve OPM’s IT services.

Those discussions revealed the need for:

- More innovation and more collaboration on appropriate use of emerging technologies
- Improvements and better visibility into service performance
- Better communication from OCIO about its plans
- More participation from OCIO customers in defining critical requirements

This plan incorporates the use of industry best practices and standards for IT planning, to deliver IT effectively and efficiently for its customers. The plan is structured on the Technology Business Management (TBM) value management framework. TBM defines the tools, processes, data, and people needed to manage the business of technology. Using TBM and other leading industry frameworks, OCIO developed aspirational strategic goals along with supporting strategic objectives that are the foundational changes required for OCIO to become a leading IT organization.

Finally, to address cross-agency priority goals in the Government Performance and Results Modernization Act of 2010\(^1\), OPM has established six Agency Priority Goals (APGs) that reflect the top performance improvement priorities of OPM leadership and the Administration. This Strategic Plan also incorporates and describes the OCIO’s critical role in supporting the agency’s delivery of those APGs.

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\(^1\)Codified at 44 U.S.C. § 3506(b)(2).
Vision, Mission, and Guiding Principles

In FY 2021, the OCIO developed its vision, mission, and guiding principles to provide a strategic direction for the organization. OCIO provides IT services to all OPM operations. OCIO supports OPM’s mission to lead federal agencies in workforce policies, programs, and benefits in service to the American people. The team also provides IT services to other agencies, including maintaining the integrity of the Electronic Official Personnel Folder (eOPF), which protects the information, rights, benefits, and entitlements of federal employees while maintaining statistical information about the federal civilian workforce. In FY 2021, the OCIO executive team created and published vision and mission statements:

- **Vision:** To deliver the best customer experience for OPM employees and customers.
- **Mission:** We lead with innovative digital and data-driven solutions that empower OPM to guide employees through their federal careers.

OCIO will realize its vision through the application of its guiding principles.

**Invest in Our Workforce**
OCIO encourages and supports formal training and obtaining technical certifications as well as coaching, mentoring, and leadership development. OCIO is offering online technical courses for all employees. OCIO implemented a program encouraging employees to dedicate time each month for training to focus on continued advancement of technology products and practices to continually meet today’s challenges.

**Put the Customer First**
Design services, devices, and channels around the customer experience, while ensuring customers feel informed, prepared, and in control. OCIO is committed to building “products” not “projects,” and designing systems “with” not “for” customers.

**Security is Everyone’s Responsibility**
Commit to protect data confidentiality, integrity, and availability to comply with security policies, audit and control procedures, privacy, and required regulations. Through the guidance of Zero Trust principles, OCIO integrates security requirements into all platforms and services.

**Deploy Enterprise Solutions**
As spelled out in Objective 2.5, driving enterprise solutions is a key tenet of the OPM Strategic Plan. The IT Strategic Plan will pursue innovation through leading-edge technologies, open standards, and novel methods, while adhering to government and agency guidelines and regulations. To the degree possible, OCIO will not develop custom or in-house applications, and instead leverage enterprise Software as a Service (SaaS) or shared services.

**Leverage Data as a Strategic Asset**
Use data to understand customer needs and drive successful outcomes. Improve information access through the integration of systems, application programming interfaces (APIs), data analytics, enterprise dashboards and reporting, enterprise search, and knowledge management.

**Be agile, and Agile**
Build and deploy services using adaptive and iterative processes, as well as customer research. Leverage modern automation to release new features rapidly and minimize risk. OCIO believes that services never stop improving.

**Cloud First**
Improve the customer experience, operations, and supportability of OPM’s enterprise solutions by maximizing cloud usage by 2025 via cloud hosting options, including federal shared services and public cloud as a service.

**Get Current, Stay Current**
Continually improve the stability and cybersecurity protections of all OPM systems by updating or replacing all end-of-life and unsupported hardware and software. This will also provide enhanced capabilities and functionality.
Key Terms and Definitions

This IT Strategic Plan is structured to include goals, objectives, and initiatives so OCIO can better manage and measure its alignment to and performance against this Strategic Plan.

**Strategic Goals**

Strategic goals are aspirational and convey how OCIO will transform its ability to better serve its customers through effective IT management disciplines and the incorporation of new technologies and service solutions. The IT Strategic Plan has six strategic goals that align with OPM’s Strategic Plan, demonstrating how OCIO will contribute to OPM in executing its mission.

**Strategic Objectives**

Within each IT strategic goal are several strategic objectives that provide direction and focus supporting the strategic goal, OCIO customers, and OPM program offices. In total, there are 25 strategic objectives, each of which has timelines and performance measures that OCIO will monitor to gauge progress.

**Initiatives**

Initiatives are the concrete actions OCIO will take to advance the strategic objectives. These initiatives include the specific projects and activities that will be delivered over the timeframe of this Strategic Plan.

**Performance Measures**

Performance measures are data-based and used to track incremental achievements and performance standards at the strategic objective and initiative level.
OCIO’s Enterprise Management Approach

The first strategic goal of OPM’s Strategic Plan FY 2022–2026 is “positioning the federal government as a model employer.” OCIO’s key supporting role for the OPM Strategic Plan is to deliver IT solutions to support OPM’s programs, federal agencies, and other stakeholders, such as applicants, retirees, and beneficiaries. To be successful, OCIO must continuously adopt and integrate best practices and IT management approaches so that it can effectively deliver on the initiatives described in this plan.
The effective use of information technology is fundamental to OPM’s ability to meet its strategic goals. The role of the CIO and OCIO is to partner with all OPM program offices to deliver OPM IT investments that are efficient and effective. The role of the CIO at OPM was established by statute in the Information Technology Management Reform Act of 1996 (ITMRA). ITMRA designates the CIO as the primary IT advisor to the Director of OPM. Since the passage of ITMRA, numerous laws, directives, and OMB guidance have defined additional CIO responsibilities, including 2014’s Federal Information Technology Acquisition Reform Act (FITARA). Responsibilities assigned to the CIO establish the foundation for this Strategic Plan, including:

1. IT Leadership and Accountability
2. IT Strategic Planning
3. IT Workforce
4. IT Budgeting
5. IT Investment Management
6. Information Security and Privacy
7. Architecture
8. Information Resources and Data

OPM has also assigned the CIO substantial IT operational responsibilities, including creating and operating the IT networks, data centers, cloud environments, systems, websites, software, and services that support OPM program offices. As such, OCIO partners with each OPM program office to meet OPM’s stakeholder needs. Meeting these operational responsibilities is the primary focus of OCIO staff, the OCIO budget, and this plan.
IT Alignment to Cross-Agency Priority Goals

Per the Government Performance and Results Modernization Act of 2010, there is a requirement to address cross-agency priority goals. OPM has established six APGs that reflect the top performance improvement priorities of OPM leadership and the Administration. APGs reflect measurable results that leadership wants to accomplish over a two-year period, advancing progress toward longer-term goals and objectives in the agency’s Strategic Plan.

OCIO, through cooperation with OPM program offices to include Diversity, Equity, Inclusion, and Accessibility (DEIA), Healthcare and Insurance (HI), and Human Capital Data Management and Modernization (HCDMM), will play a substantial support role in delivering three of the six APGs for OPM, namely:

**Number 1**
Drive a data-driven and leading practices approach to recruitment, assessment, and hiring initiatives that strengthens and supports diversity, equity, inclusion, and accessibility across the federal government. By September 30, 2023, increase the percent of hiring managers who report they have reviewed applicant flow data trends for their previous recruitment efforts by 5 points.

**Number 3**
Improve data collection, use, and sharing to help agencies successfully implement DEIA-focused programs, practices, and policies that support improved equitable services through a more engaged workforce. By September 30, 2023, create easy to use, insight-focused DEIA dashboards used by 75 percent of target agencies, and score an average 4/5 on a customer survey that tests decision-support effectiveness.

**Number 6**
Improve customer experience by making it easier for federal employees, annuitants, and other eligible persons to make more informed health insurance plan selection. By September 30, 2023, complete user-centered design and develop a minimum viable product for a new, state-of-the-art FEHBP Decision Support Tool that will give eligible individuals the necessary information to compare plan benefits, provider networks, prescription costs, and other health information important to them and their families.

OPM OCIO has incorporated these three APGs in the set of initiatives it plans to meet by September 30, 2023.
OPM’s major management priorities are reflected in Goal 2 of the agency’s Strategic Plan. The OPM IT Strategic Plan is aligned to support OPM’s organizational capacity and capability transformation, focusing on addressing OPM’s Objective 2.5.

**OPM Objective 2.5**
Modernize OPM IT by establishing an enterprise-wide approach, eliminating fragmentation, and aligning IT investments with core mission requirements.

Given the opportunities for enhancing OPM’s approach to IT management, the following IT strategic objectives are the major management priorities OCIO will focus on over the four-year span of this Strategic Plan:

- **Invest in Our Workforce: 1.2 Strategic Objective**
  Establish annual training and certification requirements based on new technologies and business frameworks.

- **Enhance Customer Value: 2.1 Strategic Objective**
  Establish customer performance improvement goals for each program office to show a direct connection to the business value, and track metrics to show improvement.

- **Enhance Customer Value: 2.3 Strategic Objective**
  Define performance requirements with each customer.

- **Improve Customer Experience: 3.3 Strategic Objective**
  Develop a governance structure, processes, and tools to identify, evaluate, prioritize, and track OPM’s IT spend.

- **Improve Customer Experience: 3.4 Strategic Objective**
  Establish budget plans and execution based on the prioritized business needs defined through the governance process.

- **Invest in Innovation: 5.1 Strategic Objective**
  Foster an innovative, collaborative culture.

- **Enhance Cybersecurity: 6.1 Strategic Objective**
  Define OPM’s overall IT security strategy and budget based on current cybersecurity tools and best practices.

- **Enhance Cybersecurity: 6.2 Strategic Objective**
  Increase cyber visibility and protection of key systems.
IT Leadership and Workforce

OPM OCIO is committed to becoming a leading IT organization within the federal government—one that is a value-added partner to OPM program offices through the effective delivery of IT solutions. This is OCIO’s first and most important strategic goal, and it starts with leadership and the IT workforce.

To succeed, OCIO must define workforce positions and organizational structures. This includes determining the skills and abilities needed to perform well in these positions. OCIO continually invests in attracting and retaining early career talent, to prepare tomorrow’s leaders who will continue OPM’s modernization journey. The four primary objectives that support this strategic goal focus on developing a diverse and skilled workforce across the employment lifecycle, from recruiting, training and development, and mentoring, to measuring the effectiveness of these efforts and continually improving.

OCIO has undergone a structural reorganization to reflect the changing nature of how IT is managed today. For instance, with OPM’s Cloud First policy, there is a need to have OCIO set cloud standards and support the adoption of cloud computing for all new applications and migration of legacy applications. OCIO has stood up a Cloud Center of Excellence (CCoE) to provide just such leadership and support. Likewise, Agile techniques and DevOps have changed how applications are designed, developed, and implemented. OCIO has reorganized itself to better enable integrated teams to handle all aspects of working in an Agile environment.

Regarding IT leadership, FY 2021 was a year of technology leadership transformation at OPM, with CIO Clare Martorana moving on to become the federal CIO, while Guy Cavallo was selected as OPM’s current CIO. Along with Mr. Cavallo’s selection, FY 2021 was a year of rebuilding the CIO’s Executive Leadership Team by hiring a new Deputy CIO, Chief Technology Officer, Policy and Governance Officer, and a Cloud/Cyber Team Lead. This leadership transformation continues with the recent appointment of a new Chief Information Security Officer (CISO) and the recent hiring of a new leader for Enterprise Infrastructure Services (EIS).

The leadership transformation of OCIO is not just taking place in the senior ranks. A Digital Services Senior Advisor, Cloud Solutions Architect, Site Reliability Engineering Senior Advisor, and Enterprise Architect were all recently hired. These leadership changes set the stage for driving the IT improvements outlined across all six goals of this IT Strategic Plan.

The plan highlights the need to professionally develop OCIO employees. This includes offering significant training opportunities spanning all stages of an employee’s career, from newly hired to those with long tenure in the federal workforce. IT and cybersecurity are rapidly evolving. To stay current and leverage new technologies and practices, such as cloud computing, OCIO is committed to helping staff learn and develop relevant IT skills.

In addition to training, OCIO is using internship and recent graduate programs to accelerate the skills of those entering federal service at OPM. These programs improve recruiting efforts, offer clear paths to federal internships for students from high school through post-graduate school, and to careers for recent graduates. OCIO is using these options to attract, develop, and mentor those early in their careers. This includes the Internship Program for current students, the Recent Graduates Program, and the Presidential Management Fellows (PMF) Program for people who obtained an advanced degree within the preceding two years. These programs, collectively the Pathways Programs, are streamlined developmental programs tailored to promote employment opportunities in the federal workforce for students and recent graduates.
The OCIO is partnering with OPM’s program offices to implement an inclusive, transparent IT governance model to drive investment decisions that align with a robust enterprise architecture and data analytics strategy while simultaneously addressing IT security requirements. The investment decisions will prioritize initiatives that achieve the best performance outcomes and are of greatest benefit to OPM, so that some funding and other resources currently dedicated to operations and maintenance can be recapitalized and invested in modernization efforts. The objectives to maturing IT governance are captured in elements of Goal 2: Enhance Customer Value, and Goal 3: Improve Customer Experience of this IT Strategic Plan. Improvements to IT governance at OPM are well underway. By establishing portfolio management and related governance processes, OPM program offices are part of the decision-making process in setting IT investment priorities. At the overall agency level, OPM has reinstituted the IT Investment Review Board (IRB) so that all OPM program offices can proactively understand and engage in setting IT priorities. Through this process, OCIO aims to be a trusted and value-added partner to OPM program offices.

As modernization of the OPM.gov website and the publishing processes that underpin it moves into its funded project phase, the Digital Governance Board (DGB) will refresh content guidelines, more carefully oversee and apply content standards, better regulate website changes, and apply modernized content management principles where applicable. The purview of the DGB will include both internet and intranet content and operations. The DGB includes representation from OPM’s Offices of Communications, Privacy, the Chief Management Officer, and the OCIO.

To support this governance model, a new Capital Investment and IT Acquisition Review (CIITAR) process went live, modernizing how capital and IT investments valued at $250K or more are approved. CIITAR replaces cumbersome and—in some cases—paper-based processes, and is an upgrade for all OPM employees who use the process to complete their work. OCIO worked with stakeholders across the agency to develop CIITAR, including user testing, training, and job aids. In FY 2022, more than $58 million in Capital Investment Committee (CIC) requests and more than $150 million in IT acquisition reviews have gone through CIITAR. And recently, OPM established an IT Working Capital Fund (WCF), which, from a funding perspective, is a crucial component of OCIO modernization efforts for FY 2023 and FY 2024. An OPM IT WCF gives OPM more flexibility in how it funds IT programs, and also provides a means to harvest and reuse savings to further IT modernization efforts.

To achieve OPM’s strategic goals, OCIO will optimize and integrate IT capabilities throughout OPM, proactively engage stakeholders at all levels through the IT governance model, and innovatively address the needs of both the public and job seekers. OCIO will partner with program office leaders for mutual accountability and adherence to data standards and enterprise architecture, which will be required for successful adoption of the HR lifecycle IT framework.
OCIO’s Enterprise IT Initiatives

Today’s modern IT leverages enterprise services to simplify operations, improve cybersecurity, and lower costs. Below are the key enterprise IT initiatives OCIO is undertaking as part of this IT Strategic Plan.
OCIO’s Enterprise IT Initiatives

Cloud First
At the heart of OPM’s modernization efforts is the agency’s use of cloud technologies. OPM’s cloud initiative forms the foundation for building IT services and applications that are responsive, proactive, adaptive, and resilient, and advance OPM’s mission to support and empower a federal civilian workforce of 2.1 million.

The gains from an effective cloud strategy and successful implementation will be enormous, particularly in the agency’s ability to provide better support and more flexibility to both internal and external customers. The cloud strategy also leverages the cloud’s native cybersecurity capabilities, including the use of artificial intelligence (AI) and machine learning (ML), which protect OPM’s systems and data.

In the future, OPM aims to develop and optimize all new systems and applications for deployment in the cloud. OCIO will evaluate all legacy IT systems while identifying and prioritizing candidates for cloud migration based on value to the business and the effort to migrate the systems. By FY 2025, OCIO’s goal is to have targeted OPM IT systems either moved to the cloud or have plans to move to the cloud.

OCIO’s Cloud Center of Excellence (CCoE) is setting standards for cloud use and migration, providing architectural guidance, conducting analyses of legacy applications, and developing the plan for migrating legacy applications to the cloud. As part of the CCoE initiative, OCIO established a FinOps practice to optimize budgeting and cloud financial operations. With this approach, OPM is able to leverage its cloud resources across the enterprise and establish a robust IT infrastructure to support its modernization efforts.

Enterprise Collaboration and the Hybrid Workforce
Over the past couple of years, OCIO has made an effort to address OPM needs for improved collaboration tools and capabilities. The onset of the COVID-19 pandemic enhanced these efforts, requiring that OPM facilitate a hybrid work environment for its employees. OCIO chose Microsoft Teams as its preferred collaboration platform. Today, all OPM employees have access to Teams, which enables them to conduct online meetings, chat, share content, etc., wherever they reside. Teams Calling lets employees and contractors make business calls from home, and facilitates Team video calls, chat, and file sharing.

OCIO is implementing another collaboration capability: Poll Everywhere. This capability enables the use of online polling, surveys, Q&As, etc., to engage remote participants. OCIO will continue to assess online collaboration capabilities that may be of value to OPM and its employees.

To support this focus on the OPM workforce, OCIO established the Champions Network, consisting of more than 100 volunteers from across OPM who help communicate and represent their program areas in technology modernization and business transformation. The Champions Network was critical to the successful rollout of Microsoft 365 tools, including Teams and Office, by piloting applications and facilitating and delivering training. These employees act as change advocates and coaches to support their offices as they adopt new work tools. OCIO is planning to institutionalize the use of the Champions Network for all new IT system deployments.

Retirement Services Modernization
As Retirement Services (RS) modernizes its business operations, OPM’s OCIO will support it with a commitment to providing responsive, intuitive, online self-service, and human-assisted services to federal employees and retirees.

The development and successful delivery of information systems leveraging digital technologies are critical to the overall success of RS’ modernization. OCIO will support the appropriate
OCIO’s Enterprise IT Initiatives

process disciplines—including IT Agile project management, development, security, and operations (DevSecOps), rigorous component and system testing, and robust operations support—to realize RS’ vision.

OCIO will use its Digital Services team to support RS customer service specialists in making online interactions with users both compelling and intuitive, leveraging digital technologies such as data analytics to support personalization of the experience. These capabilities were already used to modernize the RS Contact Center.

Going forward, every year OCIO and RS will prioritize modernization initiatives based on available resources. These initiatives include:

- Modernize Janus with an intuitive cloud-based Retirement Calculator for RS staff.
- Modernize the retirement processing pipeline, to include Electronic Retirement Records (ERR), Online Retirement Application (ORA), and RS Surveys.
- Modernize Rep Payee with a cloud-based database and user interface to replace the manual form and to help manage a third-party vendor to pay beneficiaries who need assistance managing their funds.
- Modernize Retirement Data Repository (RDR) to support the life cycle handling of federal employees and enable OPM to analyze the data across the population of federal retirees.
- Modernize the Customer Relationship Management (CRM) solution for the Retirement Information Office (RIO).
- Migrate the Document Case Control System (DCCS) to the cloud.

Taken together, these initiatives will make significant progress toward moving RS away from its current paper-based system and toward a modern digital retirement process.

A related challenge for the RS modernization effort is to migrate all legacy applications off the current mainframe computing environment. These custom applications, written in COBOL, will require refactoring and redeveloping the business logic in a modern programming language. These new applications will be hosted in the cloud as part of the migration. Planning for this mainframe migration is underway, and OCIO understands the importance of treating this as a high-risk program, one that will require prototypes and pilots to demonstrate the soundness of the technical architecture and application refactoring approach.

Healthcare and Insurance Modernization

OCIO will support Healthcare and Insurance (HI) by implementing new portals and decision support tools, which facilitate the direct enrollment of users with various health insurance providers. Like other customer-facing portals, these will be cloud-based and leverage a modern, secure content management system with tools that are user-friendly, intuitive, and accessible.

In particular, the Postal Service Reform Act of 2022 requires OPM to coordinate and collaborate across intra- and inter-agency boundaries, including OPM HI, RS, and OCIO as well as the Social Security Administration, Veterans Administration, and the Centers for Medicare and Medicaid Services (CMS), to establish the Postal Service Health Benefits (PSHB) Program. The PSHB Program will become a separate, dedicated health benefits program for the 1.7 million United States Postal Service (USPS) employees, annuitants, and their eligible family members, and will operate in parallel to the Federal Employees Health Benefits (FEHB) Program.

This effort will focus on creating a superior customer experience for postal employees, annuitants, and their families in accordance with the law and the President’s Management Agenda (PMA) priorities of strengthening andempowering the federal workforce. It will take advantage of a hybrid technology architecture that is modular in nature, including cloud-hosted
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environments, managed services, and existing systems to provide the most flexibility for any future changes brought on by evolving business requirements and technologies.

**OPM.gov Modernization**

Modernizing OPM.gov, the federal employee portal, is an essential investment in technology that will strengthen and empower the federal workforce. OPM.gov is visited annually by more than 22 million federal employees, job seekers, annuitants, veterans, and family members. Federal employees, HR professionals, Chief Human Capital Officers, and departments, agencies, and sub-agencies from across government rely on OPM.gov for insurance, retirement, policy, suitability, and agency services information to support and empower the federal workforce.

The opportunity to transform OPM.gov into a cloud-hosted, user-centric site supports the PMA priorities of strengthening and empowering the federal workforce, and delivering excellent, equitable, and secure federal services and customer experience. Content on OPM.gov will be reorganized, redesigned, and standardized to serve OPM customers. The update will include a more modern, more secure content management system with tools that are user-friendly, intuitive, and accessible.

OCIO’s Digital Services team, which includes customer experience specialists, will support OPM’s ambitious objectives in OPM.gov modernization. These team members design and deliver solutions aligned to the federal career journey map and focus on the tools, customer feedback, and innovations necessary to transform the customer experience with OPM’s systems and websites. The team works with program office partners to establish continuous customer feedback channels, including surveys and focus groups, to guide the agency’s path forward.

Further, the team will use design methods, such as human-centered design, integrating customer feedback to improve key customer portals, such as OPM.gov. The team will also solicit innovative approaches across government and industry to enable OPM to move rapidly.

**USA Suite (USAJOBS®, USA Staffing®, USA Hire®, USA Performance®, and USA Learning®) Optimization**

Content on these sites will be reorganized, redesigned, and standardized to serve federal agencies. For example, OCIO will continue to work with Human Resources Solutions (HRS) to create a personalized USAJOBS® experience to help applicants find relevant opportunities, which include evaluating and implementing search engine optimization and ML and AI technologies for personalized search experience improvements. The team will consolidate OPM talent acquisition customer support and modernize user support by evaluating and implementing applicant chat bot technologies.

Additional enhancements to the hiring pipeline will include a candidate inventory that provides hiring managers with direct access to an inventory of qualified and eligible candidates that can be selected without opening a new announcement. This will help agencies improve time to hire while preserving HR’s role in confirming applicant eligibility and qualification. This also benefits applicants when they submit a single application and can be considered for multiple opportunities. The team, in collaboration with OMB’s U.S. Digital Service, will also deliver a Structured Resume Review tool to expand agency access and improve usability, reportability, privacy, and security.

OCIO will continue to enhance the USA Suite and other on-premises applications, based on customer experience. As part of its cloud migration journey, OCIO has deployed tools to assist in
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estimating the cost and determining when to move the USA Suite and other applications to the cloud.

Cybersecurity
IT security is critical to OPM. Every OPM executive, manager, and employee plays an important role in helping the agency protect the sensitive data of federal applicants, employees, and retirees. Ultimately, OPM must be viewed as—and serve as—a trusted entity for that data. Given the importance of protecting the personnel data of federal government employees and retirees, appropriate cybersecurity defenses are of utmost importance to OPM. As such, it is one of six goals laid out in this IT Strategic Plan.

Over the past year, OPM has substantially enhanced its vulnerability management capabilities, automating the ability to detect and identify new hardware and software added to OPM’s networks and systems. The agency has also improved its patch management capabilities, so that commercial software is patched proactively to significantly reduce OPM’s systems and data vulnerabilities. Further, OPM has implemented a more efficient incident response capability. This provides the agency a more automated means, where possible, to detect and respond to threats that can undermine OPM’s systems.

This is just the start. The core approach is to embrace Zero Trust concepts and implement an enterprise-wide business and technical architecture. This will include revamping OPM’s business processes and implementing cybersecurity solutions that comply with Zero Trust principles, so that the agency can verify that all people and processes accessing OPM systems and data are authenticated, both to their identity and their need for access.

OPM will also seek to integrate cybersecurity more directly into its software development practices through adopting DevSecOps practices and an enterprise approach to a Software Development Pipeline (SDP). This will enable cybersecurity professionals to integrate in the teams that build OPM’s systems.

A successful cybersecurity program is not just about the implementation of technical solutions. OPM embraces the concept that everyone has a role in the cybersecurity program and understands that role. OPM is providing tailored training to all employees in the agency on safe practices when they use OPM online systems and access sensitive data.

Diversity, Equity, Inclusion, and Accessibility
OCIO supports the Office of Diversity, Equity, Inclusion, and Accessibility’s (ODEIA) mission and vision to elevate and honor the OPM workforce by drawing from the full diversity of the nation, seeking to achieve an equitable and inclusive workforce, and striving to become a model employer accessible to all. OCIO will support the PMA and this program by ensuring that all IT systems in OPM meet federal guidelines for accessibility, adhering to Section 508 guidelines so that OPM maintains an accessible technology environment for users with disabilities.

Business Intelligence and Data Visualization
An essential element of enhancing customer experience is to make better use of OPM data, consistent with the Privacy Act and guidance from OMB. This will enable OPM to better serve the federal employee and retiree population.

The Human Capital Data Management and Modernization (HCDMM) Directorate is responsible for all data across OPM. During FY 2021, OCIO partnered with HCDMM to enhance the collection, utilization, and accessibility of human capital management data to address recent Executive Order 14035 requirements and align with the Foundations for Evidence-Based Policymaking Act of 2018, Pub. L. 115-435 (Jan. 14, 2019).
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This human capital joint effort enabled HCDMM to provide critical OPM HR data in a recent White House report. Using enterprise standard tools, HCDMM extracted and distilled needed personnel data for senior White House officials. OCIO will continue to support HCDMM in its efforts to better harness and leverage HR across the federal government.

OCIO has made business intelligence (BI) and data visualization capabilities available to OPM employees. Through the use of an enterprise standard business intelligence application, OPM employees can access a robust set of business analytics tools. In addition to standard data analytics and visualization capabilities, these tools have embedded ML and AI and comprehensive reporting capabilities to aid users in gleaning insights from all types of datasets. OCIO will continue working with HCDMM and other OPM program offices to provide new tools and capabilities as needed, prioritized via the IT governance model.

For example, OCIO, HCDMM, and HRS are working together, within the Data Analytics Infrastructure Assessment Working Group and the Data Visualization Working Group, to build enterprise government-wide dashboards (e.g., to show job posting and hiring outcome metrics for federal hiring, and to show demographic and engagement data on federal employees and the federal hiring process).

The information will be sourced from current OPM data sources to include USAJOBS®, USA Staffing®, Federal Employee Viewpoint Survey (FEVS), and Enterprise Human Resources Integration (EHRI), and will enable government-wide agency access to HR data to inform decisions on HR policies.

Enterprise Technology Contracts

To simplify the OPM IT environment, OCIO is committed to having OPM enterprise contracts in place that support many of the IT services and products that the OPM program offices need. In collaboration with the OPM Office of Procurement Operations, OCIO already has enterprise capabilities in place to provide data analytics, customer relationship management (CRM), large file transfer, and enterprise scanning capabilities, to name a few. By leveraging the IT governance process, OCIO will work with the OPM program offices to continue to identify and assess other opportunities to implement enterprise contracts that can benefit some or even all of the OPM program offices.

Technology Separation from the Defense Counterintelligence and Security Agency

While national background investigations work is now the responsibility of the Defense Counterintelligence and Security Agency (DCSA), OPM OCIO is still responsible for supporting a number of legacy systems. While OCIO will continue to support such systems over the next couple of years, it is important that this migration is completed to free up resources for OCIO to focus solely on OPM-related work.
The OPM IT Strategic Plan includes six OCIO aspirational strategic goals. Each is supported by and aligns with one or more of the eight OCIO Guiding Principles. These strategic goals, while distinct, are mutually reinforcing. Achieving strategic objectives in one strategic goal supports improvement in all six strategic goals.
OPM IT Strategic Plan Goals and Objectives

OCIO used a comprehensive process to develop its FY 2023-2026 IT Strategic Plan. It started with customer insights gained through interviews with all OPM program offices, to align with and support OPM’s Strategic Plan. Those discussions revealed the need for:

- More innovation and more collaboration on appropriate use of emerging technologies
- Improvements and better visibility into service performance
- Better communication from OCIO about its plans
- More participation from OCIO customers in defining critical requirements

OCIO also gathered information from the Office of the Inspector General (OIG) and GAO recommendations, assessments conducted by independent organizations, including National Academy of Public Administration (NAPA), federal mandates, and industry standards. This plan also incorporates the use of industry best practices and standards for IT planning to enable OCIO to deliver IT effectively and efficiently to its customers.

The plan is structured on the Technology Business Management (TBM) value management framework. TBM defines the tools, processes, data, and people needed to manage the business of technology. Using TBM and other leading industry frameworks, OCIO developed aspirational strategic goals along with supporting strategic objectives that are the foundational changes required for OCIO to become a leading IT organization.

This Strategic Plan will guide OCIO’s actions over the next four fiscal years. As shown in Appendix C, each strategic goal and objective has tangible initiatives that OCIO will undertake for each fiscal year of the plan. Further, each strategic goal and objective will have annual internal performance measures. As appropriate, these will be included in OCIO executives’ and managers’ annual performance plans, motivating all OCIO leaders to accomplish various elements of this plan.

It starts with the OCIO workforce. Having the right staff, with the right skills and abilities, in the proper organizational structure, is the foundation for success, and it is Goal 1. The strategic goals of Enhance Customer Value (Goal 2) and Improve Customer Experience (Goal 3) focus OCIO on effectively and efficiently managing OPM’s IT, while supporting the business of OPM. Goal 4 defines OPM’s IT Modernization strategy, including procurement, development, and deployment of the appropriate IT solutions to meet OPM’s mission and business objectives.

IT is about innovation, and OPM strives to use the latest technologies and processes to deliver its mission (Goal 5). Finally, Cybersecurity (Goal 6) must be top of mind in everything OPM does. There can be no compromising OPM’s commitment to protecting sensitive federal personnel data and supporting systems.

Frameworks
- Industry Standards
- Aspirational Goals
- Long-Range Objectives to Achieve Strategic Goals
- Concrete Actions to Achieve Strategic Objectives & Goals

Data
- Customer Insights, GAO Recommendations, Independent Assessments, Federal Mandates, Industry Standards
Invest in our Workforce

Strategic Goal 1: Continue investing in diverse and skilled talent across all phases of the employment lifecycle

OPM OCIO is committed to becoming a leading IT organization within the federal government—one that is a value-added partner to OPM program offices through the effective delivery of IT solutions. This is OCIO’s first and most important strategic goal, and it starts with people. To succeed, OCIO must define workforce positions and organizational structure. This includes defining the skills and abilities to perform well in these positions. The OCIO is also focused upon continually investing in attracting and retaining talent, preparing tomorrow’s leaders to continue OPM’s modernization journey. The four primary strategic objectives that support this strategic goal focus on developing a diverse and skilled workforce across the employment lifecycle, from recruiting, training and development, and mentoring, to measuring the effectiveness of these efforts and working to continually improve.

1.1 Strategic Objective: Empower and train supervisors with the tools to hire and retain qualified and skilled talent

Recruiting individuals with the requisite skills and abilities in IT and cybersecurity is challenging. There is substantial competition for this talent in government and the private sector. With well-defined position descriptions, a commitment to the professional development of all OCIO staff, and the adoption of leading technologies and IT business process frameworks, OPM OCIO can attract and retain qualified and skilled talent to meet 21st century challenges.

Initiatives for this strategic objective include:
- Train hiring managers to effectively leverage hiring criteria and job descriptions.
- Effectively utilize available programs designed to attract appropriately skilled employees to OCIO.
- Align job descriptions to roles and responsibilities.
- Track employee turnover at the division level.

1.2 Strategic Objective: Establish annual training and certification requirements based on new technologies and business frameworks

OCIO is committed to its staff’s professional development. This includes offering significant training opportunities with the expectation that OCIO staff will pursue job-related education and certifications. This commitment spans all stages of an employee’s career, from newly hired to those with long tenure in the federal workforce. IT and cybersecurity are rapidly evolving. To stay current and leverage new technologies and practices, such as cloud computing, OCIO is committed to helping staff constantly learn and develop relevant IT skills.

Initiatives include:
- Identify a digital transformation training pipeline and communicate to OCIO staff.
- Launch classes in the Scrum Agile Framework (SAFe) practices.
- Upskill the workforce to support a Cloud First agenda.

1.3 Strategic Objective: Formalize an IT mentoring program in conjunction with an OPM mentoring program

Working with a mentor on a career plan is one of the most effective techniques for staff to develop knowledge, skills, and abilities (KSAs). As part of this plan, employees will develop an individual development plan (IDP) that outlines steps to invest in themselves over a multi-year period. Investment can include a combination of formal education and training, together with informal learning and on-the-job experience. Mentors are invaluable in helping early career talent. As an additional benefit, establishing a mentor program can inform senior leadership as they develop a formal OCIO succession plan, identifying those who can be the organization’s future leaders.

Initiatives include:
- Effectively utilize available programs designed to attract appropriately skilled employees to OCIO.
- Align job descriptions to roles and responsibilities.
- Launch classes in the Scrum Agile Framework (SAFe) practices.
- Upskill the workforce to support a Cloud First agenda.

1.4 Strategic Objective: Measure the effectiveness of hiring and training processes, and identify opportunities to improve

As an organization committed to learning, and given the criticality of people to its success, OCIO is committed to improving its practices across all phases of the employment lifecycle. Measuring all facets of recruitment and professional development will allow OCIO to assess and improve, benefiting all OCIO staff and making OCIO an attractive place to work.

Initiatives include:
- Establish IT recruiting and workforce success criteria.
- Identify and implement new technologies and methodologies.
- Establish an OCIO leadership program for succession planning.
- Continuously implement and improve the IDP development process.

For the Complete Initiative Listing, See Appendix C
Enhance Customer Value

Strategic Goal 2: Adopt objective, trusted performance measures to establish value and trust with customers

Every program office, employee, and contractor of the OPM team relies upon the successful delivery of OCIO IT services every day. IT is a foundational underpinning of each OPM program office, and OCIO partners with each program office to serve the federal community. As OCIO seeks to be a better partner to its customers, it is critical that OCIO, and OCIO’s customers have objective, trusted performance measures for each service. With an objective view of OCIO service performance, OCIO and the program offices can identify efficiencies, make informed decisions about where further investment is required, and anticipate the impact of those investments on OPM’s ability to serve its customers.

2.1 Strategic Objective: Establish customer performance improvement goals for each program office to show a direct connection to the business value, and track metrics to show improvement

OCIO will establish performance improvement goals for each service. OPM will measure each improvement based on its anticipated contribution to improving OPM’s services to both internal and external customers. The OPM governance process will use improvement goals so that all OPM program offices understand the business value of OCIO’s services.

Initiatives for this strategic objective include:
• Improve past performance reporting compliance
• Establish enterprise-wide contract vehicles
• Implement Lean Portfolio Management, TBM-based management, and Cloud Financial Operations
• Implement IT workflows that use industry standards to generate data that supports continuous improvement, and successful mission delivery
• Use TBM-based cost, consumption, and performance data to guide IT investment decisions

2.2 Strategic Objective: Define and establish all processes necessary to enable tracking, utilization, and performance by OPM program offices

OCIO provides a wide range of services to OPM staff and program offices. To establish trusted performance measures for each service, OCIO must develop processes that require performance measures be well-defined, meaningful, routinely captured, and facilitate productive discussions.

Initiatives include:
• Define the services that OCIO provides to each customer and their appropriate measures
• Communicate service definitions and performance measures to each customer
• Publish an OCIO service catalog
• Establish an industry standard measure for help desk satisfaction ratings

2.3 Strategic Objective: Define performance requirements with each customer

Each OCIO service, and every IT investment, should be driven by customer needs. Working with each customer, OCIO will define the services that customers require, and the level of performance needed for success. Using the TBM taxonomy, OCIO can track every dollar of enterprise OPM IT spend to a customer requirement.

Initiatives include:
• Conduct discovery sessions with programs to build a mutual understanding of current systems’ capabilities and program offices’ needs
• Establish a service level agreement (SLA) with each customer that includes performance measures and establishes expectations when relevant
• Conduct customer experience research in alignment with the goals of Executive Order 14058: Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government

2.4 Strategic Objective: Use cost, utilization, and performance data to interact with each OPM program office

With trusted measurements of OCIO’s level of service, customers and OCIO can pursue data-driven conversations about the value and prioritization of IT investments. The resulting decisions can be the basis for detailed IT modernization plans, including updating OPM’s enterprise architecture (EA) and the EA transition strategy.

Initiatives include:
• Partner with all OPM program offices so that all IT development includes adequate full-time SME participation from direct business partners
• Deliver regular service reports to customers
• Expand service performance reports to include any services requested by customers
• Account for all costs of providing services
**Strategic Goal 3: Align every IT investment to the business priorities of the agency**

OPM OCIO is a support and service organization to OPM’s program offices. All IT investments should support OPM’s business priorities. OCIO will establish portfolio management and related governance processes so that the OPM program offices are part of the decision-making process in setting IT investment priorities. OCIO will proactively engage with customers through transparency and knowledge sharing, which are both integral to setting IT priorities. Ultimately, OCIO aims to be a trusted and value-added partner to the OPM program offices, optimizing IT spend to support OPM business operations.

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### 3.1 Strategic Objective: Establish and maintain portfolio management and governance processes for business input, feedback, and transparency in OCIO operations

OCIO is a provider to OPM’s program offices. OCIO partners with the program offices to provide effective IT applications that modernize and improve OPM services. OCIO will put governance mechanisms in place to meet program office needs and priorities that are transparent and objectively part of IT investments.

**Initiatives for this strategic objective include:**
- Review all IT investments through the IRB
- Create a technical architecture and roadmap that supports OPM business modernization
- Incorporate the guidance of the OPM Strategic Plan into OCIO plans and investments
- Create an OCIO Digital Governance Board

### 3.2 Strategic Objective: Establish a relationship management function for OPM customers

OCIO will establish communication processes needed to facilitate constant communication with OCIO customers, promulgating information about its decisions and soliciting customer feedback on needs and priorities. OCIO will have liaisons for OPM program offices when relevant.

**Initiatives include:**
- Maintain a forum for stakeholder feedback
- Assign a project manager to major projects
- Eliminate duplicative systems across the enterprise
- Communicate IT plans and actions to customers

### 3.3 Strategic Objective: Develop a governance structure, processes, and tools to identify, evaluate, prioritize, and track OPM’s IT spend

OCIO will work with OPM program offices to develop a prioritized annual budget operating plan and governance process. This will enable program offices to be involved in setting priorities for IT investment decisions.

**Initiatives include:**
- Establish a governance structure to prioritize and track OPM IT spending
- Implement processes and tools to track OPM IT spending
- Establish a cloud governance structure and processes to optimize OPM cloud usage
- Implement processes and tools to identify, evaluate, prioritize, and optimize OPM’s cloud utilization
- Establish and implement an IT Working Capital Fund (WCF)

### 3.4 Strategic Objective: Establish budget plans and execution based on the prioritized business needs defined through the governance process

Using the TBM taxonomy, OCIO will transparently tie each element of the OCIO budget plan and execution to identified and prioritized customer needs. Further, OCIO will track legacy systems and capture new planned investments in the OCIO IT modernization plan as well as the OPM enterprise architecture.

**Initiatives include:**
- Establish a prioritized budget for all OCIO expenditures
- Develop and implement strategic sourcing, so that OCIO spending aligns with customer and agency priorities
- Submit all TMF-eligible projects to OMB for potential funding
- Proactively review and evaluate contracts to appropriately support the OCIO’s short- and long-term goals and objectives
- Establish formulation and execution mechanisms and financial management policies and controls that align with federal financial management and business priorities
- Establish acquisition program management mechanisms to efficiently use resources

### 3.5 Strategic Objective: Implement standards and practices to reduce the number of audit recommendations and findings

Tracking progress and resolving open audit recommendations is a key initiative.

**Initiatives include:**
- Develop policies and a team to address outstanding GAO and IG recommendations
- Resolve outstanding GAO and IG recommendations
- Improve the agency-wide FISMA and FITARA scores
- Work to reduce new GAO and IG recommendations

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Modernize OPM Information Technologies

Strategic Goal 4: Modernize IT across OPM through investments in systems and technologies to improve customer experience

This goal, IT modernization, includes the procurement, development, and deployment of the appropriate IT solutions to meet OPM’s mission and business objectives. OPM will use leading-edge technologies and processes to maximize productivity and lower development risk. Further, OPM is committed to implementing the core tenets of the President’s Executive Order 14058 Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government across all OPM technology projects.

4.1 Strategic Objective: Enhance customer experience through an improved OPM digital presence

Today, OPM’s websites are the primary means by which OPM customers interact with the agency to find relevant information and use OPM services. Improving the customer experience is vital to Goal 3 of the OPM Strategic Plan of improving the customer satisfaction index score for targeted services to 4.3 out of 5.

Initiatives for this strategic objective include:
- Modernize OPM.gov and the intranet
- Transition the USA Suite to the cloud and enhance the customer experience
- In support of the President’s Management Agenda, adopt the use of modular, common building blocks for digital services, including digital infrastructure, products, services, or channels, which may be implemented singly or in combination
- Complete a user-centered design and develop a minimum viable product for a new Federal Employees Health Benefits (FEHB) Program decision support tool that will give eligible individuals the necessary information to compare plan benefits, provider networks, prescription costs, and other health information
- Launch a digital retirement system pilot to move from a predominantly paper-based system to an all-digital-based system
- Develop a U.S. Postal Service Health Portal and decision support tool

4.2 Strategic Objective: Improve OPM customer experiences by modernizing key internal systems

While web presence enhancements are critical for applicants, federal employees, and retirees, there are numerous systems that support OPM employees in addressing key agency priorities. OPM will work with the OPM program offices to determine ongoing modernization priorities for these internal systems.

Initiatives include:
- Consolidate all existing OPM help desks into one help desk, to reduce silos and implement enterprise solutions
- For the Retirement Services Call Center, add chat bot, knowledge base development, and integration with legacy systems to speed the retrieval of retiree information
- Modernize the Janus retirement calculator
- Develop and upgrade user interfaces, modernize system components, and enhance data integration of Retirement Services systems to improve customer service
- Partner with HCDMM and the Office of Privacy to expand and leverage cloud services to enhance employee productivity and cybersecurity protections
- For the Retirement Services Call Center, add chat bot, knowledge base development, and integration with legacy systems to speed the retrieval of retiree information
- Modernize the Janus retirement calculator
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- Develop and upgrade user interfaces, modernize system components, and enhance data integration of Retirement Services systems to improve customer service
- Partner with HCDMM and the Office of Privacy to expand and leverage cloud services to enhance employee productivity and cybersecurity protections
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Strategic Goal 5: Enhance the customer experience through the application of innovative technology

IT advances rapidly, providing frequent opportunities for OPM to adopt modern solutions and services. Currently, OCIO is leveraging technology innovations such as cloud computing, artificial intelligence, and machine learning, as well as process innovations such as Agile and DevSecOps. OCIO will establish the innovation processes needed to understand, nurture, and embrace new technologies.

5.1 Strategic Objective: Foster an innovative, collaborative culture

Productive innovations can come from a variety of sources. OCIO will collaborate with internal OPM offices, other government agencies, and the private sector to identify innovation opportunities and establish a culture that invests in promising innovations.

Initiatives for this strategic objective include:

- Initiate an OCIO policy to move forward in an agile manner
- Establish a policy requiring Agile/DevSecOps for all OCIO systems development projects, and incorporate customer experiences and practices in the DevSecOps lifecycle
- Require all OCIO staff to adopt Agile management practices via robust training, an awareness program, and policy reinforcement
- Incorporate customer experiences and practices in the DevSecOps lifecycle

5.2 Strategic Objective: Enhance the customer experience by establishing an innovation team, staffed with both OCIO and customer champions, to experience and evaluate new technology products and solutions. After a pilot, solutions will be considered for possible enterprise implementation

To achieve value, innovations must be nurtured, piloted, evaluated, and—if valuable to OPM’s program offices—brought to production. OCIO will establish an innovation governance function to engrain the process of innovation into the OCIO and OPM cultures.

Initiatives include:

- Charter an OPM IT innovation working group to review and authorize innovation investments
- Establish enterprise-wide budget and funding mechanisms for innovation investments as approved through the governance process
- Evaluate innovation projects to date, and graduate key successes to production
- Evaluate innovation investments aligned to business results
- Establish an OPM Innovation Network that works to identify outside sources of expertise, practices, and solutions that OPM can leverage

For the Complete Initiative Listing, See Appendix C
6.1 Strategic Objective: Define OPM’s overall IT Security strategy and budget based on current cybersecurity tools and best practices

All organizations that leverage IT face a tension: how much does one take away from investments that serve its mission to invest in IT security? Given the sensitivity of the data and its operations, OPM has developed a sound, funded security strategy. As an example, OPM is updating commercial software and hardware releases, meeting requirements of the recently issued Executive Order (EO) on cybersecurity, and deploying secure configurations for applications and data migrating to the cloud.

Initiatives for this strategic objective include:
- Achieve and self-fund IT security strategy objectives for the life of this Strategic Plan
- Implement all elements of Executive Order 14028
- Improving the Nation’s Cybersecurity
- Develop and implement a security architecture leveraging cloud-based solutions
- Coordinate with Facilities, Security, and Emergency Management (FSEM) regarding appropriate responses to disaster scenarios
- Implement a risk quantification program
- Streamline Authorization to Operate (ATOs) and move to a continual systems security authentication process

6.2 Strategic Objective: Increase cyber visibility and protection of key systems

Not all data and systems are the same when it comes to IT security. OPM will continue addressing cyber vulnerabilities for its systems and related data. This has the highest near-term priority of all strategic objectives within this strategic goal.

Initiatives include:
- Continue enhancing enterprise logging and monitoring capabilities with OPM key systems
- Continuously enhance enterprise vulnerability and baseline configuration scanning capabilities with OPM key systems
- Continuously improve logging, log retention, and log management capabilities to enhance visibility and incident response actions
- Execute action plans to address gaps in cyber supportability for OPM key systems

6.3 Strategic Objective: Achieve cyber modernization to counter ever-changing and increasing threats to OPM’s mission

IT security vulnerabilities are constantly changing, and solutions to address vulnerabilities are continually evolving. OPM leverages current, proven technologies and continually modernizes its cybersecurity architecture. This includes adopting a Zero Trust architecture and solution over the next couple of years, and implementing a robust Identity, Credential, and Access Management (ICAM) solution. Additionally, OPM is deploying cybersecurity capabilities to address all systems and data in the cloud and conducting rigorous application testing for all software developed for OPM.

Initiatives include:
- Continue complying with OMB Memorandum M-22-09, Moving the U.S. Government Toward Zero Trust Cybersecurity Principles by the end of FY 2024, and implement an OPM-wide Zero Trust program
- Establish an enterprise-wide ICAM program
- Continue improving the authentication capabilities and experience for all OPM customers
- Use the Security Orchestration, Automation, and Response (SOAR) platform to automate and improve existing processes
- Implement a rigorous application security testing program
- Implement cloud native cybersecurity AI and ML tools

6.4 Strategic Objective: Train OPM staff in cybersecurity role and responsibilities

A critical facet of OPM’s IT security strategy is the role of OPM’s stakeholders. OPM ODCC will define all stakeholder roles and develop cybersecurity training specific to each role. As stakeholders receive training, OPM ODCC will solicit feedback to make such training more valuable and compelling.

Initiatives include:
- Continue defining and reevaluating security responsibilities for all OPM stakeholders
- Continue requiring that OPM staff complete basic cybersecurity training to learn about cybersecurity roles and provide OPM staff with appropriate advanced cybersecurity training
- Establish continuous improvement objectives for OPM staff in security awareness and compliance

6.5 Strategic Objective: Increase the perception of OPM as a trusted entity in the protection of customer and stakeholder data, and mission-critical processing

Through yearly improvements to OPM’s FISMA score, cybersecurity cross-agency priority goals, delivering on commitments to implement a Zero Trust solution, and meeting DHS Binding operational Directives and Emergency Directives, OPM will become a trusted entity in the protection of its customer data and mission-critical processing.

Initiatives include:
- Continue improving OPM’s communications around the agency’s IT security posture
- Continue improving OPM’s system owner visibility into the system’s security posture
Appendix A: Strategy Summary

**Invest in Our Workforce**

Strategic Goal 1: Continue investing in diverse and skilled talent across all phases of the employment lifecycle

1.1 Empower and train supervisors with the tools to hire and retain qualified and skilled talent
1.2 Establish annual training and certification requirements based on new technologies and business frameworks
1.3 Formalize an IT mentoring program in conjunction with an OPM mentoring program
1.4 Measure the effectiveness of hiring and training processes, and identify opportunities to improve

**Enhance Customer Value**

Strategic Goal 2: Adopt objective, trusted performance measures to establish value and trust with customers

2.1 Establish customer performance improvement goals for each program office to show a direct connection to the business value, and track metrics to show improvement
2.2 Define and establish all processes necessary to enable tracking, utilization, and performance by OPM program offices
2.3 Define performance requirements with each customer
2.4 Use cost, utilization, and performance data to interact with each OPM program office

**Improve Customer Experience**

Strategic Goal 3: Align every IT investment to the business priorities of the agency

3.1 Establish and maintain portfolio management and governance processes for business input, feedback, and transparency in OCIO operations
3.2 Establish a relationship management function for OCIO customers
3.3 Develop a governance structure, processes, and tools to identify, evaluate, prioritize, and track OPM’s IT spend
3.4 Establish budget plans and execution based on the prioritized business needs defined through the governance process
3.5 Implement standards and practices to reduce the number of audit recommendations and findings

**Modernize OPM Information Technologies**

Strategic Goal 4: Modernize IT across OPM through investments in systems and technologies to improve customer experience

4.1 Enhance customer experience through an improved OPM digital presence
4.2 Improve OPM customer experiences by modernizing key internal systems
4.3 Expand and leverage cloud services to enhance employee productivity and cybersecurity protections
4.4 Continuously evaluate and upgrade solutions to improve the communications of today’s hybrid workforce
4.5 Expand the Champions Network, OCIO’s partnership across the agency to help with technology and change management

**Invest in Innovation**

Strategic Goal 5: Enhance the customer experience through the application of innovative technology

5.1 Foster an innovative, collaborative culture
5.2 Enhance the customer experience by establishing an innovation team, staffed with both OCIO and customer champions, to experience and evaluate new technology products and solutions. After a pilot, solutions will be considered for possible enterprise implementation

**Enhance Cybersecurity**

Strategic Goal 6: Protect citizen data and build trust with a comprehensive security strategy

6.1 Define OPM’s overall IT security strategy and budget based on current cybersecurity tools and best practices
6.2 Increase cyber visibility and protection of key systems
6.3 Achieve cyber modernization to counter ever-changing and increasing threats to OPM’s mission
6.4 Train OPM staff in cybersecurity role and responsibilities
6.5 Increase the perception of OPM as a trusted entity in the protection of customer and stakeholder data, and mission-critical processing
## Appendix B: OPM and IT Strategic Plan Alignment

### OPM IT Strategic Goals and Objectives

#### IT Strategic Goals

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<th>Strategic Goal 1: Continue investing in diverse and skilled talent across all phases of the employment lifecycle</th>
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#### IT Strategic Objectives

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### OPM Strategic Goals

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<th>Goal 1: Position the federal government as a model employer, improving the government-wide satisfaction index score by 4 points</th>
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<th>Goal 3: Create a human-centered customer experience by putting the needs of OPM’s customers at the center of OPM’s workforce services, policy, and oversight, increasing OPM’s customer satisfaction index score for targeted services to 4.3 out of 5</th>
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## Appendix B: OPM and IT Strategic Plan Alignment

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<th>OPM Strategic Goals</th>
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<td>Strategic Goal 4: Modernize IT across OPM through investments in systems and technologies to improve customer experience</td>
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<td>Goal 1: Position the federal government as a model employer, improving the government-wide satisfaction index score by 4 points</td>
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<td>4.2 Improve OPM customer experiences by modernizing key internal systems</td>
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<td>4.3 Expand and leverage cloud services to enhance employee productivity and cybersecurity protections</td>
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<td>4.4 Continuously evaluate and upgrade solutions to improve the communications of today’s hybrid workforce</td>
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<td>Strategic Goal 5: Enhance the customer experience through the application of innovative technology</td>
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<td>6.5 Increase the perception of OPM as a trusted entity in the protection of customer and stakeholder data, and increase critical processing</td>
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Strategic Goal 1: Continue investing in diverse and skilled talent across all phases of the employment lifecycle

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<td>Continue investing in diverse and skilled talent across all phases of the employment lifecycle</td>
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<td>Empower and train supervisors with the tools to hire and retain qualified and skilled talent</td>
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<td>Formalize an IT mentoring program in conjunction with an OPM mentoring program</td>
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<td>Establish an Ocio leadership program for succession planning</td>
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<td>Continuously implement and improve the IDP development process</td>
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<td>Measure the effectiveness of hiring and training processes, and identify opportunities to improve</td>
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<td>Establish IT recruiting and workforce success criteria</td>
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<td>Continue providing a diverse, equitable, inclusive, and accessible work environment for all Ocio employees</td>
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<td>Align Ocio strategic goals and objectives to individual performance and development plans, including training on new technologies and methodologies</td>
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<td>Assess the current organizational structure and align position descriptions so that they are modern and competitive in the marketplace</td>
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### Appendix C: OPM IT Strategic Roadmap

#### Strategic Goal 2: Adopt objective, trusted performance measures to establish value and trust with customers

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<td>Adopt objective, trusted performance measures to establish value and trust with customers</td>
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<td>Establish customer performance improvement goals for each program office to show a direct connection to the business value, and track metrics to show improvement</td>
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<td>Improve past performance reporting compliance</td>
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<td>Establish enterprise-wide contract vehicles</td>
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<td>Implement Lean Portfolio Management, TBM-based management, and Cloud Financial Operations</td>
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<td>Implement IT workflows that use industry standards to generate data that supports continuous improvement, and successful mission delivery</td>
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<td>Use TBM-based cost, consumption, and performance data to guide IT investment decisions</td>
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<td>Define and establish all processes necessary to enable tracking, utilization, and performance by OPM program office</td>
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<td>Define the services that OCIO provides to each customer and their appropriate measures</td>
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<td>Communicate service definitions and performance measures to each customer</td>
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<td>Publish an OCIO service catalog</td>
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<td>Establish an industry standard measure for help desk satisfaction ratings</td>
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<td>Define performance requirements with each customer</td>
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<td>Conduct discovery sessions with programs to build a mutual understanding of current systems' capabilities and program offices' needs</td>
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<td>Establish a service level agreement (SLA) with each customer that includes performance measures and establishes expectations when relevant</td>
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<td>Conduct customer experience research in alignment with the goals of Executive Order 14081: Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government</td>
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<td>Use cost, utilization, and performance data to interact with each OPM program office</td>
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<td>Partner with all OPM program offices so that all IT development includes adequate full-time SME participation from direct business partners</td>
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<td>Deliver regular service reports to customers</td>
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<td>Expand service performance reports to include any services requested by customers</td>
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<td>Account for all costs of providing services</td>
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## Appendix C: OPM IT Strategic Roadmap

### Strategic Goal 3: Align every IT investment to the business priorities of the agency

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<td>Align every IT investment to the business priorities of the agency</td>
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<td>Establish and maintain portfolio management and governance processes for business input, feedback, and transparency in OCIO operations</td>
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<td>3.1.3</td>
<td>Incorporate the guidance of the OPM Strategic Plan into OCIO plans and investments</td>
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<td>Create an OPM Digital Governance Board</td>
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<td>3.3</td>
<td>Establish a relationship management function for OCIO customers</td>
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<tr>
<td>3.3.1</td>
<td>Maintain a forum for stakeholder feedback</td>
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<td>3.3.2</td>
<td>Assign a project manager to major projects</td>
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<td>3.3.3</td>
<td>Eliminate duplicative systems across the enterprise</td>
<td>X</td>
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<td>3.3.4</td>
<td>Communicate IT plans and actions to customers</td>
<td>X</td>
<td>X</td>
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<tr>
<td>3.4</td>
<td>Establish a governance structure, processes, and tools to identify, evaluate, prioritize, and track OPM’s IT spend</td>
<td>✅</td>
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<tr>
<td>3.4.1</td>
<td>Establish a governance structure to prioritize and track OPM IT spending</td>
<td>X</td>
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<tr>
<td>3.4.2</td>
<td>Implement processes and tools to track OPM IT spending</td>
<td>X</td>
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<tr>
<td>3.4.3</td>
<td>Establish a cloud governance structure and processes to optimize OPM cloud usage</td>
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<tr>
<td>3.4.4</td>
<td>Implement processes and tools to identify, evaluate, prioritize, and optimize OPM’s cloud utilization</td>
<td>X</td>
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<td>3.4.5</td>
<td>Establish and implement an IT Working Capital Fund (WCF)</td>
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<td>3.4.6</td>
<td>Establish budget plans and execution based on the prioritized business needs defined through the governance process</td>
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<td>3.4.7</td>
<td>Establish a prioritized budget for all OCIO expenditures</td>
<td>X</td>
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<td>3.4.8</td>
<td>Develop and implement strategic sourcing, so that OCIO spending aligns with customer and agency priorities</td>
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<td>3.4.9</td>
<td>Submit all TPM-eligible projects to OMB for potential funding</td>
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<tr>
<td>3.4.10</td>
<td>Proactively review and evaluate contracts to appropriately support the OCIO’s short- and long-term goals and objectives</td>
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### Strategic Goal 3: Align every IT investment to the business priorities of the agency

| ID | OPM IT Strategic Goal - Strategic Objective - Initiative | Q1 2022 | Q2 2022 | Q3 2022 | Q4 2022 | Q1 2023 | Q2 2023 | Q3 2023 | Q4 2023 | Q1 2024 | Q2 2024 | Q3 2024 | Q4 2024 | Q1 2025 | Q2 2025 | Q3 2025 | Q4 2025 | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2026 |
|----|-------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| ✓  ✓ ✓ | Establish formulation and execution mechanisms and financial management policies and controls that align with federal financial management and business priorities | X       | X       | X       | X       | X       |         |         |         | — Continuous Improvements — |
| ✓  ✓ ✓ | Establish acquisition program management mechanisms to efficiently use resources | X       | X       | X       | X       | X       |         |         |         | — Continuous Improvements — |
| ✓   | Implement standards and practices to reduce the number of audit recommendations and findings |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| ✓  ✓   | Develop policies and a team to address outstanding GAO and IG recommendations | X       | X       | X       | X       |         |         |         |         | — Continuous Improvements — |
| ✓  ✓   | Resolve outstanding GAO and IG recommendations | X       | X       | X       | X       |         |         |         |         | — Continuous Improvements — |
| ✓  ✓   | Improve the agency-wide FISMA and FITARA scores | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       |
| ✓  ✓   | Work to reduce new GAO and IG recommendations | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       | X       |

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<thead>
<tr>
<th>OPM Goal 1</th>
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<th>OPM Goal 5</th>
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<tr>
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Appendix C: OPM IT Strategic Roadmap

— Continuous Improvements —
## Appendix C: OPM IT Strategic Roadmap

### Strategic Goal 4: Modernize IT across OPM through investments in systems and technologies to improve customer experience

<table>
<thead>
<tr>
<th>ID</th>
<th>OPM IT Strategic Goal - Strategic Objective - Initiative</th>
<th>Q4 2022</th>
<th>Q1 2023</th>
<th>Q2 2023</th>
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<th>Q4 2023</th>
<th>Q1 2024</th>
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<th>Q2 2026</th>
<th>Q3 2026</th>
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<tbody>
<tr>
<td>4</td>
<td>Modernize IT across OPM through investments in systems and technologies to improve customer experience</td>
<td>✓ ✓ ✓ ✓</td>
<td>Q4 2022</td>
<td>Q1 2023</td>
<td>Q2 2023</td>
<td>Q3 2023</td>
<td>Q4 2023</td>
<td>Q1 2024</td>
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<td>Q4 2025</td>
<td>Q1 2026</td>
<td>Q2 2026</td>
<td>Q3 2026</td>
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<tr>
<td>4.1</td>
<td>Enhance customer experience through an improved OPM digital presence</td>
<td>✓ ✓ ✓ ✓</td>
<td>X X X X X</td>
<td>Continuous Improvements</td>
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#### 4.1.1 Modernize OPM.gov and the intranet to include the following strategies:
- Use human-centered design principles to create a site that is designed for external customers (rather than for OPM program offices), helps customers efficiently obtain the information they need, and creates opportunities for feedback
- Migrate to a cloud-hosted OPM.gov platform to allow for elasticity as demand increases or decreases, delivering a positive customer experience during peak usage
- Implement a modern content management platform to update and maintain the content on OPM.gov more easily
- Establish a unified approach to the development and maintenance of web content

#### 4.1.2 Transition the USA Suite to the cloud and enhance the customer experience by improving USAJOBS®, USA Staffing®, USA HireSM, USA Performance®, and USA Learning® by using the following strategies:
- Increase stakeholder access to USA Suite applications data to drive improvements to the federal hiring process
- Collaborate with USA.gov Login.gov team to improve the USAJOBS® authentication experience
- Implement USA Suite applications IT modernization efforts to leverage technology and process advancements
- Improve USA Suite applications Voice of Customer sourcing and support mechanisms

#### 4.1.3 In support of the President’s Management Agenda, adopt the use of modular, common building blocks for digital services, including digital infrastructure, products, services, or channels, which may be implemented singly or in combination

#### 4.1.4 Complete a user-centered design and develop a minimum viable product for a new Federal Employees Health Benefits (FEHB) Program decision support tool that will give eligible individuals the necessary information to compare plan benefits, provider networks, prescription costs, and other health information

#### 4.1.5 Launch a digital retirement system pilot to move from a predominantly paper-based system to an all-digital-based system

#### 4.1.6 Develop a U.S. Postal Service Health Portal and decision support tool

#### 4.2 Improve OPM customer experiences by modernizing key internal systems

#### 4.2.1 Consolidate all existing OCIO help desks into one help desk, to reduce silos and implement enterprise solutions

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*OPM | Information Technology Strategic Plan | Fiscal Years 2023-2026*
Appendix C: OPM IT Strategic Roadmap

Strategic Goal 4: Modernize IT across OPM through investments in systems and technologies to improve customer experience

| ID | OPM IT Strategic Goal | Objective | Initiative | Q4 2022 | Q1 2023 | Q2 2023 | Q3 2023 | Q4 2023 | Q2 2024 | Q3 2024 | Q4 2024 | Q2 2025 | Q3 2025 | Q4 2025 | Q2 2026 | Q3 2026 | Q4 2026 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 4.2.2 | Modernize the Janus retirement calculator |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.2.3 | Develop and upgrade user interfaces, modernize system components, and enhance data integration of Retirement Services systems to improve customer service |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.3.1 | Continue to fully support the ODC’s Cloud Center of Excellence (CCoE) and its mission to provide oversight and consultation on cloud best practices throughout the agency |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.3.2 | Develop new applications in the cloud, and use application rationalization to set priorities for existing applications to migrate to the cloud |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.3.3 | Migrate mainframe and on-premises databases to the cloud |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.4.1 | Accommodate a hybrid workforce |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.4.2 | Maintain systems remotely without on-premises dependencies |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.5.1 | Formulate the Champions Network in policy and approach, to use the Champions Network for the rollout of any new system |  |  | X | X | X | X | X | — Continuous Improvements — |
| 4.5.2 | Document “lessons learned” from the Champions Network support to improve its value for future system rollouts |  |  | X | X | X | X | X | — Continuous Improvements — |
## Strategic Goal 5: Enhance the customer experience through the application of innovative technology

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<tr>
<th>ID</th>
<th>OPM IT Strategic Goal - Strategic Objective - Initiative</th>
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<th>Q1 2023</th>
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<tbody>
<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Enhance the customer experience through the application of innovative technology</td>
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<td>✓ ✓ ✓ ✓ ✓</td>
<td>Foster an innovative, collaborative culture</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Initiate an OCIO policy to move forward in an agile manner</td>
<td>X</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Establish a policy requiring Agile/DevSecOps for all OCIO systems development projects, and incorporate customer experiences and practices in the DevSecOps lifecycle</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Require all OCIO staff to adopt Agile management practices via robust training, an awareness program, and policy reinforcement</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Incorporate customer experiences and practices in the DevSecOps lifecycle</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Enhance the customer experience by establishing an innovation team, staffed with both OCIO and customer champions, to experience and evaluate new technology products and solutions. After a pilot, solutions will be considered for possible enterprise implementation</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Charter an OPM IT innovation working group to review and authorize innovation investments</td>
<td>X</td>
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<td>Continuous Improvements —</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Establish enterprise-wide budget and funding mechanisms for innovation investments as approved through the governance process</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Evaluate innovation projects to date, and graduate key successes to production</td>
<td>X</td>
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<td>Continuous Improvements —</td>
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<tr>
<td>✓ ✓ ✓ ✓ ✓</td>
<td>Evaluate innovation investments aligned to business results</td>
<td>X</td>
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<td>✓ ✓ ✓ ✓ ✓</td>
<td>Establish an OPM Innovation Network that works to identify outside sources of expertise, practices, and solutions that OPM can leverage</td>
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### Appendix C: OPM IT Strategic Roadmap

**Strategic Goal 6: Protect citizen data and build trust with a comprehensive security strategy**

| ID   | OPM IT Strategic Goal - Strategic Objective - Initiative                                                                 | Q4 2022 | Q1 2023 | Q2 2023 | Q3 2023 | Q4 2023 | Q2 2024 | Q3 2024 | Q4 2024 | Q2 2025 | Q3 2025 | Q4 2025 | Q2 2026 | Q3 2026 | Q4 2026 | Q2 2027 | Q3 2027 | Q4 2027 |
|------|----------------------------------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 6    | Protect citizen data and build trust with a comprehensive security strategy                                               |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1  | Define OPM's overall IT security strategy and budget based on current cybersecurity tools and best practices              |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1.1| Achieve and self-fund IT security strategy objectives for the life of this Strategic Plan                                    | X       |         |         |         |         |         |         |         |         | Continuous Improvements |         |         |         |         |         |         |
| 6.1.2| Implement all elements of Executive Order 14028 improving the nation's cybersecurity                                       | X       | X       | X       | X       |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1.3| Develop and implement a security architecture leveraging cloud-based solutions                                            | X       | X       | X       | X       |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1.4| Coordinate with Facilities, Security, and Emergency Management (FSEM) regarding appropriate responses to disaster scenarios | X       | X       | X       | X       |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1.5| Implement a risk quantification program                                                                                    | X       | X       | X       | X       |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.1.6| Streamline Authorization to Operate (ATOs) and move to a continual systems security authentication process                    | X       | X       | X       | X       |         |         |         |         |         |         |         |         |         |         |         |         |
| 6.2  | Increase cyber visibility and protection of key systems                                                                      |         |         |         |         |         |         |         |         |         |         | Continuous Improvements |         |         |         |         |         |
| 6.2.1| Continue enhancing enterprise logging and monitoring capabilities with OPM key systems                                       | X       | X       | X       | X       | X       |         |         |         |         | Continuous Improvements |         |         |         |         |         |
| 6.2.2| Continuously enhance enterprise vulnerability and baseline configuration scanning capabilities with OPM key systems         | X       | X       | X       | X       |         |         |         |         |         | Continuous Improvements |         |         |         |         |         |
| 6.2.3| Continuously improve logging, log retention, and log management capabilities to enhance visibility and incident response actions | X       | X       | X       | X       | X       |         |         |         |         | Continuous Improvements |         |         |         |         |         |
| 6.2.4| Execute action plans to address gaps in cyber supportability for OPM key systems                                           | X       | X       | X       | X       |         |         |         |         |         | Continuous Improvements |         |         |         |         |         |
| 6.3  | Achieve cyber modernization to counter overchanging and increasing threats to OPM's mission                                |         |         |         |         |         |         |         |         |         | Continuous Improvements |         |         |         |         |         |         |
### Appendix C: OPM IT Strategic Roadmap

**Strategic Goal 6: Protect citizen data and build trust with a comprehensive security strategy**

| OPM Goal 1 | OPM Goal 2 | OPM Goal 3 | OPM Goal 4 | ID | OCIO IT Strategic Goal - Strategic Objective - Initiative | Q4 2022 | Q1 2023 | Q2 2023 | Q3 2023 | Q4 2023 | Q1 2024 | Q2 2024 | Q3 2024 | Q4 2024 | Q1 2025 | Q2 2025 | Q3 2025 | Q4 2025 | Q1 2026 | Q2 2026 | Q3 2026 | Q4 2026 |
|-------------|-------------|-------------|-------------|----|----------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.1 Continue to comply with OMB Memorandum M-22-09, Moving the U.S. Government toward Zero Trust Cybersecurity Principles by the end of FY 2024, and implement an OPM-wide Zero Trust program | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.2 Establish an enterprise-wide Identity, Credential, and Access Management (ICAM) program | X | X | X | X | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.3 Continue improving the authentication capabilities and experience for all OPM customers | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.4 Use the Security Orchestration, Automation, and Response (SOAR) platform to automate and improve existing processes | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.5 Implement a rigorous application security testing program | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.3.6 Implement cloud-native cybersecurity AI and ML tools | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.4 Train OPM staff in cybersecurity role and responsibilities | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.4.1 Continue defining and reevaluating security responsibilities for all OPM stakeholders | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.4.2 Continue requiring that OPM staff complete basic cybersecurity training to learn about cybersecurity roles | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.4.3 Improve quality in advanced cybersecurity training, and provide OPM staff with appropriate advanced cybersecurity training | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.4.4 Establish continuous improvement objectives for OPM staff in security awareness and compliance | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.5 Increase the perception of OPM as a trusted entity in the protection of customer and stakeholder data, and mission-critical processing | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.5.1 Continue improving OPM’s communications around the agency’s IT security posture | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ | 6.5.2 Continue improving OPM’s system owner visibility into the system’s security posture | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |