

Enterprise Lifecycle Investment Management

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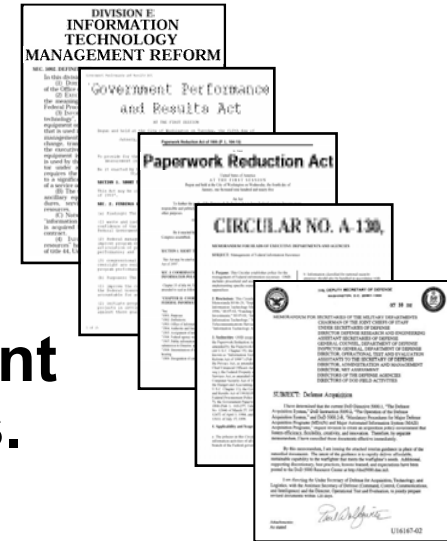
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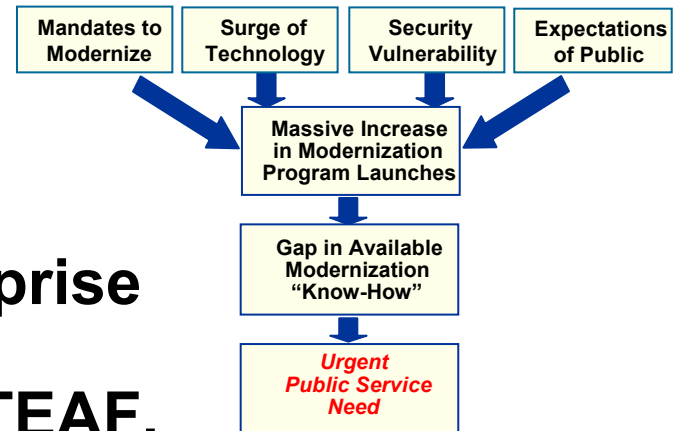
Problem

- Federal agencies must make sound, results-oriented resource allocation and investment decisions across the full investment life cycle.
- Federal guidance (including OMB Circulars A-11 and A-130 and (interim) DoD 5000 Series) now requires that the capital planning and investment control process be based on current and target enterprise architectures.
- Thus, there is a strong need for an analytically based decision-making process that is consistent with the organization's existing enterprise architecture framework.

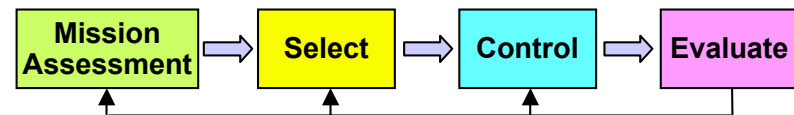


Background

- The Center for Enterprise Modernization (CEM) is seminal in the development and implementation of enterprise architecture frameworks for government agencies (e.g., TEAF, FEAF).



- Center for Acquisition and Systems Analysis (CASA) is the home for the analysis of investment strategy processes, methods, and tools (e.g., PALM, BSC-DA).



- Together, these resources provide the foundation for creating a powerful Enterprise Life Cycle “Investment Management Toolkit.”



Objectives

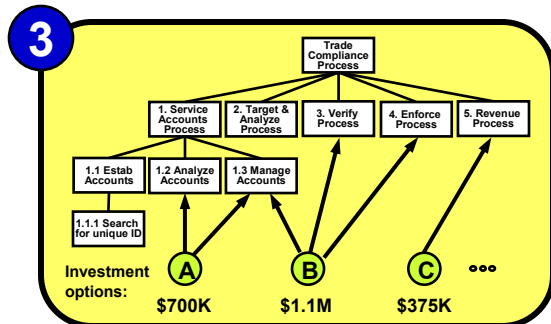
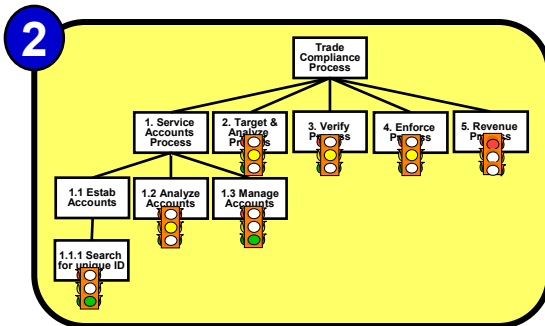
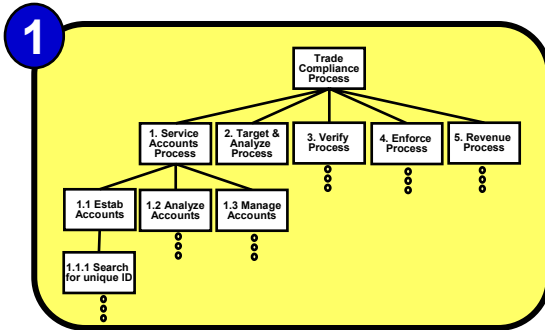
- **Establish a "gold standard" in investment management analyses for federal agencies, government oversight organizations, and the vendor community**
- **Integrate and extend current investment analysis methods, tools, and processes by encompassing the full investment management life cycle in order to**
 - **Ensure consistency and alignment with established enterprise architecture frameworks (e.g., TEAF, FEAF)**
 - **Provide a robust capability to achieve repeatable, traceable, defensible investment decisions**

Activities

- Review literature and evaluate products
- Integrate MITRE-developed prototype tools
- Extend MITRE-developed prototype tools/methods
 - Support investment management throughout lifecycle
 - Align with enterprise architecture frameworks
- Conduct case study
- Engage vendor/user/government oversight communities

Demonstration

■ Typical steps in the investment selection process



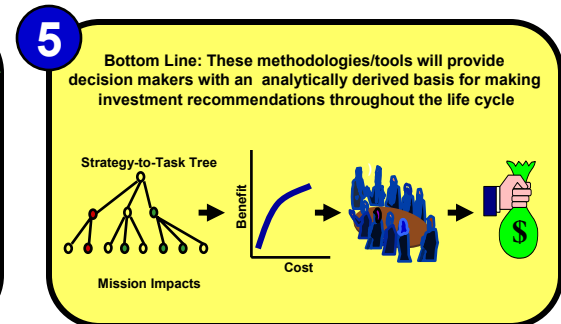
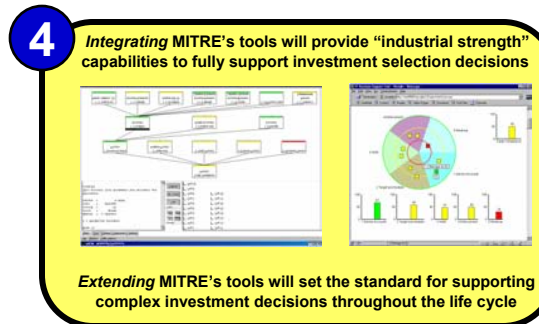
1 Determine capability linkages and decision environment

2 Develop baseline assessments and hierarchy rules

3 Identify capability improvement options

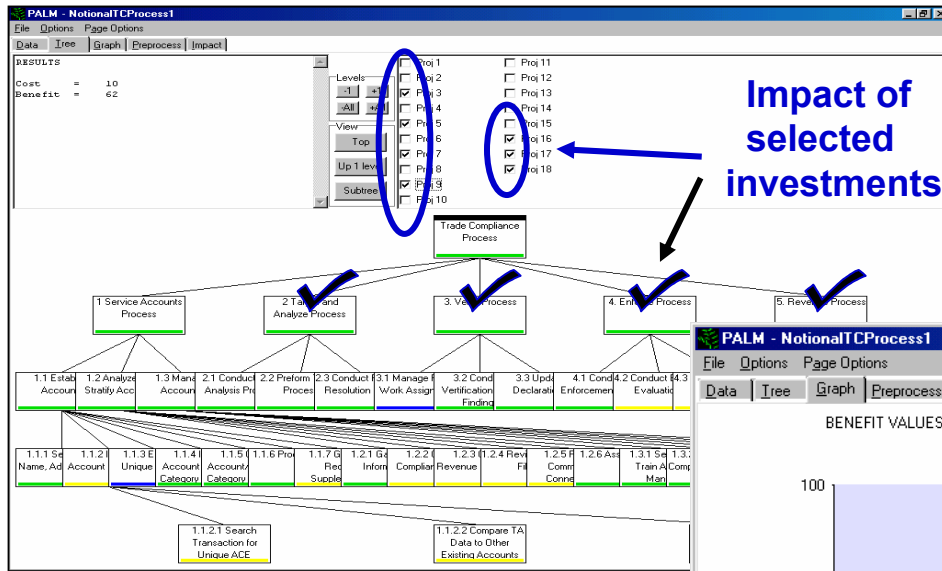
4 Apply decision analytic methodologies

5 Gain insights and make investment recommendations



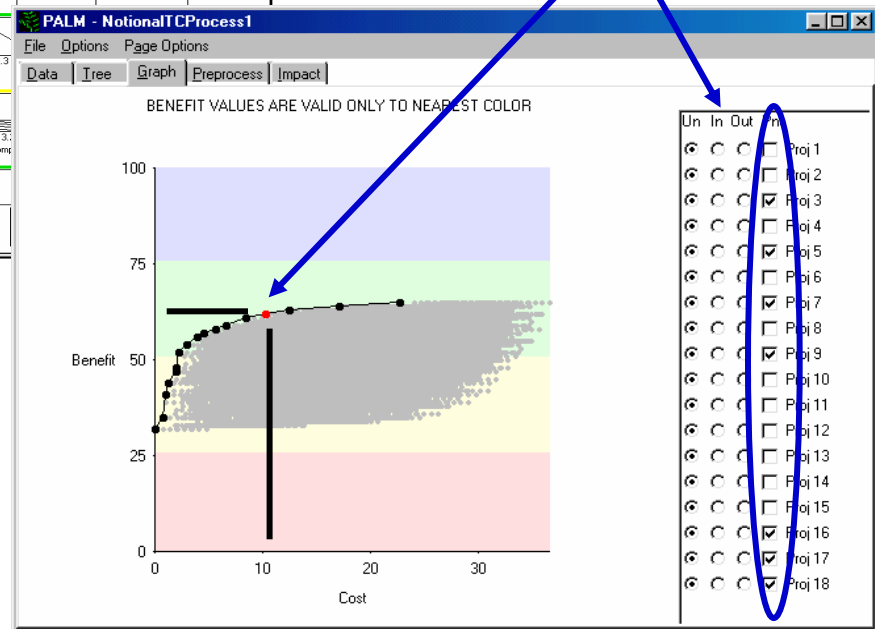
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■ PALM screenshots



Strategy to task tree

Efficient frontier



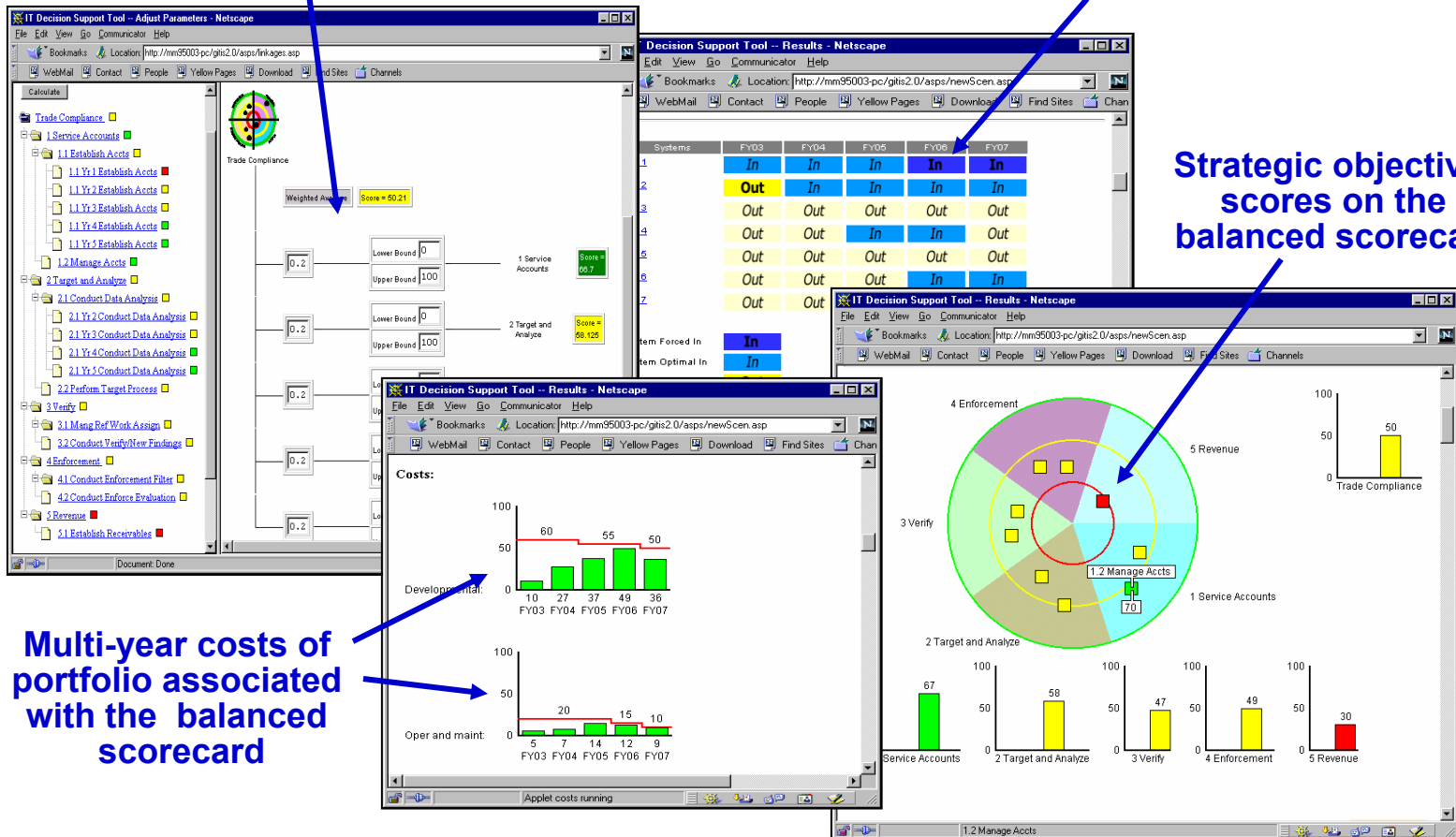
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■ BSC-DA screenshots

Multi-year strategy-to-task tree

Portfolio investment roadmap associated with the balanced scorecard

Strategic objective scores on the balanced scorecard



Multi-year costs of portfolio associated with the balanced scorecard

Impacts

- **Updating and expanding literature review on portfolio methods and tools**
- **Establishing a “way ahead” for integrating enterprise architecture frameworks with investment strategy processes**
- **Making significant progress in establishing lifecycle process and integrating existing tools**
- **Proposing case study with USCG**
- **Incorporating lessons learned from sponsor’s investment processes and tool applications**

Future Plans

