

Shared Services		Investment Planning Guidance Checklist								
		Stakeholder		Customer Agency		QSMO		OSSPI		OMB
Accountability		Responsible	Informed	Responsible	Informed	Responsible	Informed	Responsible	Informed	
STEP 1 COLLABORATION Improve Awareness of Investment between Agency & QSMO	1.1. Vision/Business Need									
	Determine and share agency's vision for investment. Initiate discussions	x			x					
	Obtain funding documentation supporting agency's Capital Planning & Investment Control (CPIC) process	x			x					
	Review standard business capabilities (M3 Playbook 1.12)	x								
	Document additional mission critical and unique capabilities	x								
	Complete Business Needs Workbook	x			x					
	1.2. Engagement									
	Provide scenario-based framework to assist agencies on when and how to engage with QSMO		x	x						
	1:1 Customer Agency/QSMO engagement	x			x					
	- Present business need				x					
	- Gain understanding of QSMO Offerings & Timelines									
	Review agency business needs and requirements:									
	- Technical									
	- Interoperability									
	- Operational (availability, maintainability, reliability)		x	x						
- Migration										
1.3. Comparison										
Review agency requirements against Marketplace solutions										
- Review QSMO Services and Capabilities										
- Review QSMO management processes and documentation										
- Crosswalk QSMO Services against Agency needs										
- NA (No marketplace exists)										
Assesses if QSMO solutions meet Customer Agency needs and provides a recommendation with supporting rationale for proposed path forward		x	x							
1.4. Decision										
If Requesting Agency determines to leverage the QSMO solution, then no further action is required. If no marketplace exists or marketplace solutions do not meet the need, proceed to Step 2: Assessment.	x		x			x		x		
STEP 2 ASSESSMENT Submission and Review of Agency Plan	2.1. Communicate									
	Provide guidance to agency on using Migration & Modernization Management (M3) Playbook		x	x						
	Document IAP conditions	x		x			x			
	In the absence of operational QSMO marketplaces, Customer Agencies must demonstrate the following for both Streamlined and Comprehensive IAPs:									
	- The business standards are incorporated in any proposed investment									
	- Clear plan to off-ramp the selected solution once the QSMO has a viable alternative available in its marketplace									
	- Develop a plan to execute the guidance provided in the M3 playbook									
	2.2. Draft IAP									
	Determine if conditions exist which require a Comprehensive IAP (Check all that apply):									
	- Acquisition of new, replacement system									
	- Proposed Investment crosses multiple QSMOs		x	x			x		x	
	- Adopting services and/or solutions from providers external to an operational QSMO marketplace									
	- Other conditions as identified by the QSMO									
	- NA									
	Gather/Develop requisite artifacts to support decision to opt out of QSMO marketplace (as applicable)									
- Enterprise system architecture										
- QSMO recommendation										
- Analysis of alternatives										
- Acquisition Strategy										
- Demonstration of Best Value (price, timliness, other factors)										
Investment Action Plan is drafted	x			x		x		x		
2.3. IAP Preliminary Review (Optional)										
Requesting Agency Disseminates Draft IAP to Stakeholders:										
- OMB Relevant Management Office										
- OMB Resource Management Officer										
- OMB Relevant Agency Liaison (OFCIO)										
- Shared Solutions Governance Chair (SSGC)										
- QSMO(s)										
- OSSPI										
- Relevant Standards Lead										
If warranted, all stakeholders discuss investment		x		x	x		x			
Recommendations and edits are incorporated into the final IAP	x		x							
2.4. Dissemination										
Final IAP, including supporting documents, is routed for review and concurrence (Check all that apply)										
- QSMO recommendation										
- Analysis of alternatives										
- Acquisition Strategy										
- Demonstration of Best Value (price, timliness, other factors)										
Document Additional IAP conditions	x			x		x		x		

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STEP 3 OMB DECISION	3.1. OMB Decision									
	OMB begins its review process		x		x		x	x		
	3.2. SSGB Awareness (Optional)									
	SSGB is notified of decision		x		x	x			x	
	3.3. Decision Memorandum									
	IAP receives final approval from OMB		x		x		x	x		
	3.4. Memorandum Distribution									
STEP 4 ONGOING MANAGEMENT	Decision Memo is distributed by SSGC		x		x	x				
	4.1. Consultation									
	QSMOs continue engagement with customer agencies throughout acquisition		x	x			x			
	4.2. Compliance									
	Ensure business standards are incorporated into RFP for services		x	x			x			
	Ensure IAP conditions are satisfied	x			x		x		x	