



## Client Snapshot

Department of Justice  
Portfolio Management

# Chevo Integrates Procurement, Budget, and Investment Data for Streamlined Analysis, Planning, and Reporting

The Department of Justice (DOJ) Office of Justice Programs (OJP) turned to **Chevo** to help manage more than 140 procurements annually, supporting dozens of small to mid-sized programs and projects. New requirements requested by executive leadership and external legislative mandates occur frequently, requiring agencies to be flexible and ready to evolve. **Chevo** understands the frequency of changes necessitated by legislative mandates and provided OJP budget, portfolio, acquisition, and procurement management services to develop an integrated solution to manage OJP's procurements.

## BUSINESS CHALLENGES

OJP was reliant on contractor support to enter data into Excel on an ad hoc basis and generate unique reports to satisfy data calls and executive reporting. For each new data request, the data had to be re-entered and multiple reports developed. Data was being entered from different sources and developing the data relationships was arduous. OJP had to tackle multiple challenges:

**Lack of Information** – Senior OJP leadership was faced with a lack of accurate, current, and concise information to make informed decisions about managing their IT resources.

**Data not Linked** – No direct linkages existed between procurements, project requirements, and investments; senior leadership did not have the consistent data needed to generate IT Portfolio-level reporting.

**Need for Portfolio View** – OJP was forced to make decisions on individual IT resources and did not have the readily-available information to fully consider the cascading impacts.

**Accessibility to Data** – Without access to the correlated financial and investment data, this situation dramatically minimized reporting accuracy and inhibited OJP's ability to provide proactive oversight and/or assure accurate reporting to OMB.



## SERVICES DELIVERED

### STRATEGIC MANAGEMENT

- Business Process Optimization
- Strategy Implementation

### PORTFOLIO MANAGEMENT

- Capital Planning & Investment Control
- Portfolio Assessment & Prioritization
- IT Governance
- Dashboarding

### PROGRAM/PROJECT MANAGEMENT

- PMO Implementation & Operation
- Acquisition Management

### FINANCIAL MANAGEMENT

- Planning, Programming, Budgeting, & Execution
- Financial & Budget Management

## CHEVO SOLUTION

**Chevo** utilized insights and lessons learned from multiple disciplines to craft a solution that integrates procurement, financial, project, and investment data. We developed, refined, and tailored our Investment and Acquisition Management Tool to fit OJP's culture, embedded methodologies, standards, and existing practices. The OJP OCIO utilizes this solution to manage its investment portfolio, perform scheduled and ad hoc reporting, and fulfill data calls through the following:

**Linked Disparate Data** – Improved OCIO acquisition, budget, and investment processes, normalizing procurement, project requirements, budget, and investment data sets.

**Developed Data Connectivity** – Provides easy and integrated access to data.

**Consolidated Reporting** – Developed a Microsoft Access database to mirror the current electronic procurement system in order to generate basic reports not previously available. Utilized Access to maintain data integrity, creating linkages between procurements, budgets, investments, and fiscal years.

**Provided an Integrated Solution** – Created automatic links between Access and Excel, developing complex financial analysis used in reporting and decision-making. Linked these Excel workbooks to SharePoint 2013 to display data within a series of intranet-accessible Dashboards, enabling stakeholders to view information in near real-time.

**Optimized Reporting Processes** – Created a process for daily updates on Procurement status to facilitate standard, repeatable reporting on multiple levels: procurement, budget planning, and investment. These reports ease updates to the eCPIC Portfolio Tool for Investment reporting.

## OUTCOME

**Chevo's** support has resulted in:

- Improved planning, reporting, and visibility, leading to more accurate procurement, budget, and investment reporting and status
- Accessible and integrated reporting, which creatively address the bottlenecks and encumbrances that affected OJP in understanding their portfolio spending
- Resolving both low-level and detailed data integration issues
- Eliminating ineffective reporting at the highest level, which resulted in deeper understanding and interdependencies of their portfolio via Dashboard reports, accessible via SharePoint
- Providing an ability to analyze the total cost of each project as compared to the budget
- Allowing for informed budget and procurement decisions on their portfolio
- Responding to defined and ad hoc data calls with ease
- Receiving the CPIC Innovation Award at the 2014 Federal CPIC Conference.

## CHEVO DIFFERENTIATORS

### A Trusted Third Party

Chevo is free from organizational conflicts of interest because we don't perform systems integration services. We deliver quality services that routinely exceed client expectations.

### Experience in Our Field

Our employees are skilled consultants with real-world experience in Chevo's core service offerings.

### Proven Small Business Prime Contractor

We have successful past performances as a prime contractor.

## ABOUT CHEVO

Chevo Consulting, LLC, is a Women-Owned Small Business (WOSB) that helps **change** and **evolve** federal agencies, their portfolios, and programs through practical implementation of unbiased advice. We are trusted advisors and practitioners in strategic, portfolio, and program/project management.

Find out how **Chevo** and our consultants can help overcome your agency's specific challenges by contacting us at [Info@ChevoConsulting.com](mailto:Info@ChevoConsulting.com).

## CERTIFICATIONS



## CONTACT US

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