



## Client Snapshot

Internal Revenue Service  
CPIC

## Chevo Services Generate CPIC Process Improvements at IRS

For over 15 years, **Chevo** has provided Strategy, Portfolio, Program and Project Mgmt. support to the IRS's Information Technology (IT) investment portfolio. Our support encompassed all investment [non-major, major, and major-modernization] and software development (Waterfall, Iterative, Agile) types, with lifecycle costs ranging from \$5M to \$2B.

At the IRS, **Chevo** has authored more than 45 Business Cases, developed 12 comprehensive budget models, created 22+ Alternative Analysis (AA) documents, performed 12+ monthly OMB reports and 20+ Health Assessments, and created a standard Earned Value (EV) model that was adopted by 11 investments. Our success comes from our ability to maintain a Line of Sight (LoS) from the OMB requirements and governance to the underlying project mgmt. and operational practices while ensuring alignment to the Treasury/IRS mission. This comprehensive approach allows us to identify and remediate business challenges that impact the perception of individual investments within the entire IT portfolio.

### BUSINESS CHALLENGES

**Reporting is Not My Day Job** – During a budget shortfall, professional services such as IT Investment Mgmt. (IM) were assigned to existing government staff as an ancillary duty.

**Managing Risk is Risky Business** – Risk Mgmt. was often overlooked/misunderstood for agile software development programs.

**Managing to the Report vs. Reporting to What You Manage** – Late-breaking and ad hoc requests forced federal staff to react versus anticipate reporting requirements.

**Fragmented or Disjointed Reporting Requirements** – Agency reporting requirements came from multiple divisions and levels, each with unique requirements and none considering the existent reporting.

**TechStat Review** – CPIC reporting for the WebApps Agile development showed large variance in spending due to the addition of an additional Scrum Team, triggering a TechStat Review.

**Multiple Books** – Different "books", or records, for cost estimation, acquisition, budget, performance reporting (EV), and risk mgmt. were maintained for a single investment to reflect different aspects of the program.



### SERVICES DELIVERED:

#### PORTFOLIO MANAGEMENT

- CPIC
- IT Governance
- Performance Integration
- TechStat

#### PROGRAM/PROJECT MANAGEMENT

- Financial & Budget Management
- Scheduling
- Business Cases/E300s
- Cost-Benefit Analysis
- Acquisition Management
- Risk Management

*"I like the way...your organization perform[s] quality work for us, and the comments from our customers back this up."*

Mir Rezadoost, CPIC, COTR  
Client Satisfaction survey

## CHEVO SOLUTION

Utilizing a comprehensive approach with defined processes and tools, **Chevo** helped the IRS mature their IM practices, provide audit defense, and promote proactive planning through the following:

**Investment Mgmt. Guides** – Developed guides, templates, and workshop materials that supported compliance with OMB’s A-11 requirements, instilled industry best practices, and documented standard Project Mgmt. (PM) practices.

**Risk Mgmt. Templates and Risk-Adjusted Costing** – Adapted the risk management approach to Agile software development while still incorporating all OMB risks, utilizing risk-adjusted costing while tying risk assumptions to the budget.

**TechStat Adapting to Agile** – **Chevo** used our CPIC expertise to craft the response to the TechStat review to show the increased velocity due to the addition of the Agile team. Provided an overview of the Agile development approach and how it affected the reporting cycle for the investment to the IRS and Treasury CPIC teams. Web Apps was one of the first investments government-wide to use the new OMB Agile template for Business Case Details reporting.

**Consolidated Governance Reporting** – Worked closely with CPIC and Program Mgmt. Office (PMO) to consolidate and standardize reporting, including consistent definitions for performance variances, re-use of existent reports for dual purposes, and identification of various thresholds that made investments appear mismanaged.

**Standard AA Template and Guidance** – Generated an OMB- and GAO-compliant AA template, provided practical guidance, and promoted proactive analysis of an agency’s alternative solutions.

**Financial Models** – Designed Excel-based models that incorporates budget and financial data, and created a single source for inputs and outputs that mirror reporting requirements to ease reporting burden.

## OUTCOME

**Chevo’s** support to the IRS CPIC Office, PMO organizations, and individual Investment Managers resulted in the following hallmarks:

- Supported 100% of the IRS’s major modernization investments with all receiving timely funding approval from the OMB
- Created non-major business case, AA, and governance templates that were adopted by the IRS CPIC Office as standards
- **Chevo** turned the WebApps TechStat into a learning opportunity for understanding Agile processes for the Treasury CPIC team, showing the “variance” was cost-effective and increased delivery of substantial capability to the IRS due to the Agile SW Development team productivity
- Enhanced budget, cost, and financial management through comprehensive Excel models, supporting consistent analysis and reporting with audit defense
- Enabled effective, proactive risk mgmt. that is properly linked to the investment’s budget and Agile development methodologies. Our process addressed many of the components necessary to support Agile including configuration/ use of collaboration tools and alignment of key federal IT processes for 508 compliance and Cybersecurity testing within the operating model.

“Without the dedication, professionalism, and experience....from **Chevo**, the [work] would not have been possible. Their patience and pursuit of excellence is very much appreciated by me and the entire....staff.”

Ron Blank, CPIC, HSPD-12 Portfolio Manager  
Client Satisfaction Survey

## ABOUT CHEVO

Chevo Consulting, LLC (**Chevo**), is a Woman 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, program/project, and financial 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).

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